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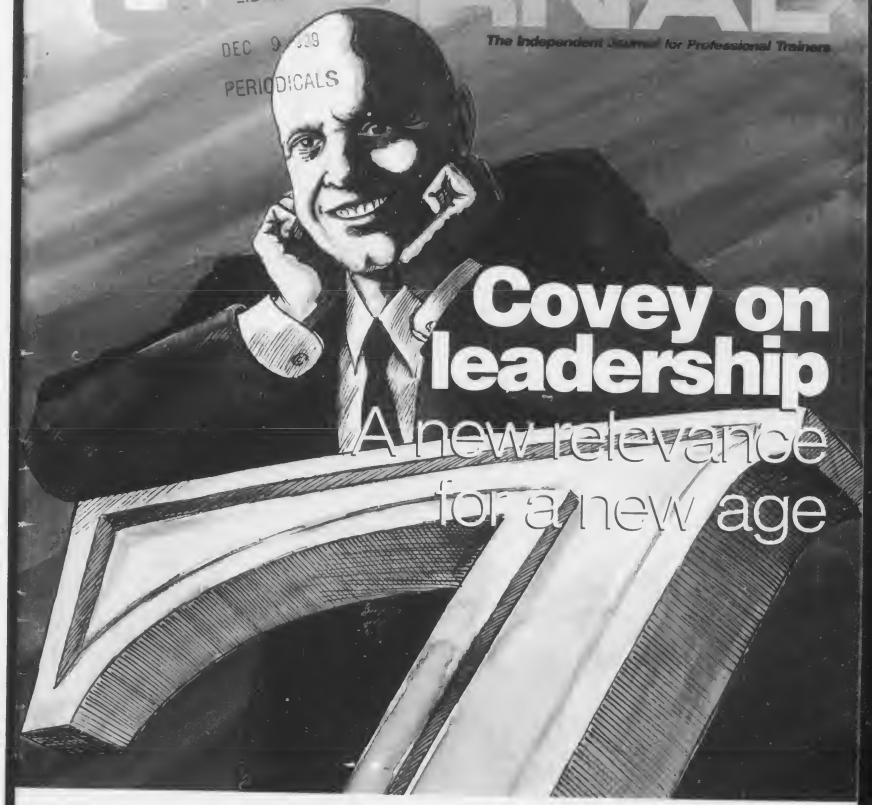
The Independent Journal for Professional Trainers



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A new relevance for a new age

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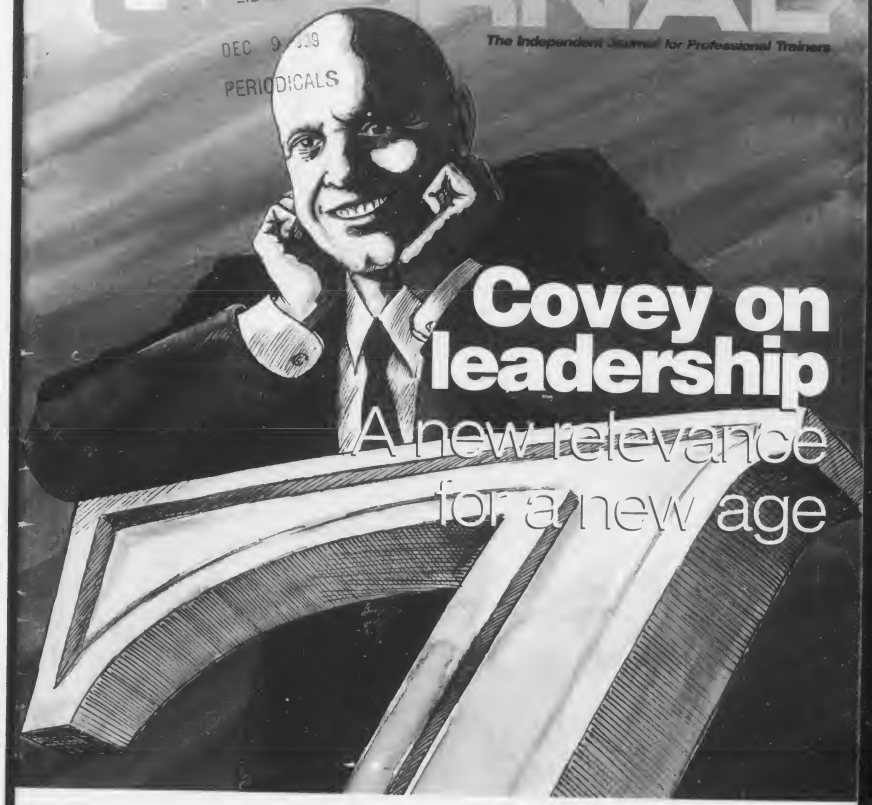

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Catch the wave

Marketing on the Internet

a new course from Spearhead Training

Profit from this new media

About the Programme

This programme is for Executives who think that the Internet may become part of their promotional mix. Hailed as the great new media, Internet hype has run ahead of reality. However, the potential is there for seriously beneficial marketing activities. Marketers simply cannot ignore the many very large international enterprises that are actively supporting web growth. They may ignore at their peril, the even larger number of enterprises from every sector of business who have a presence and are testing many innovative ideas.

Course Objectives

To brief delegates on current Web progress (using many case studies).
To demonstrate good use of the medium. To provide a forum to discuss technical queries about Web Site Management.
To stimulate ideas within the group which will help with individual organisations' marketing (communication) decisions.

What You Will Gain

Ignoring the web means that many are running the danger of being outflanked by more web aware competitors. This programme is an opportunity to keep up with what is going on and consider opportunities for one's own organisation. Small numbers on Spearhead courses means that there will be time to deal with individual delegate issues. Attending this programme will save months of individual research.

Programme Timings
1 Day Non-Residential
Start 09.45 Finish 17.00

1999 Venue, Dates & Course Fee

LONDON, Business Design Centre - Islington
22 September, 25 October, 17 December
£375 + VAT

Programme Content

The Internet
- ✓ What Is the Internet?

Internet Tools and Services
- ✓ Electronic Mail
- ✓ Mailing Lists / Groups
- ✓ Bulletin Board Systems
- ✓ The World Wide Web

Marketing on the Internet
- ✓ A Different Approach
- ✓ Web Presence
- ✓ Electronic Commerce

Marketing Strategy
- ✓ Why Have a Web Site
- ✓ Objectives and Strategies

Monitoring Results and Improving Your Strategy

Key Marketing Activities
- ✓ Market Research
- ✓ Direct Marketing on the Internet
- ✓ Selling over the Internet
- ✓ Customer Care and Online Communities

An Effective Web Presence
- ✓ What Makes a Web Site Work and Why Not?
- ✓ Creation of Web Site
- ✓ Maintaining the Web Site
- ✓ Encouraging Visitor Response
- ✓ Security of the Process

The Future
- ✓ What Technology Is Coming
- ✓ Developments
- ✓ The Next Step

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Martin Delahoussaye *is the publisher and managing editor of* Training Journal.

A song for Christmas

In this month's issue we bring you the third and final part of Linda Holbeche's valuable article on training strategy. This article has promoted a good deal of discussion and feedback, and we are indebted to Linda for the time and effort she has given to the Journal. When we talk about strategy in a training context, we mean the alignment of training to the organisation's goals and objectives. Some (all?) of these goals will be commercial. But the mere mention of the word 'commercial' is sufficient to provoke strong reactions from many HR practitioners.

At the recent IPD conference in Harrogate, a training manager from a multinational company approached our exhibition stand and expressed an interest in the free trial offer we were running on *Training Journal*. After a colleague had explained what the Journal covers and had talked about its merits I overheard the trainer say: 'I'll sign up for the free trial, but I hope you won't attempt to sell me a subscription?' It's that dirty word 'sell' that causes the problem. And, in my experience, it's a problem that is more acute among HR practitioners than any other business occupation.

It is difficult to imagine how HR can fully align itself to corporate goals where such resistance to necessary and life-supporting activities such as advertising, promotion and selling exist. Those in HR are not immune to the rigours and realities of commercial activity; its role in improving organisational prosperity is every bit as important as that of the sales and marketing teams their organisations employ.

The above experience is not an isolated incident; I have witnessed countless similar situations in the nearly 20 years I have worked in this business. The fact is, HR *is* a commercial activity. It is one spoke in the wheel of productivity improvement and organisational and personal effectiveness that directly influences corporate prosperity – at least, this should be the role of HR. Those who work under the umbrella of human resources have got to get in tune with the corporate song so they can devote most of their time to doing the right things. Only by achieving this harmony will the call to sell (there's that word again) and prove the benefits and importance of people development be heard less often in the executive corridors and offices of UK plc.

All of us on the Journal wish you a safe journey through the festivities of Christmas and the New Year.

Sincerely,

Martin Delahoussaye

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News

Recent events, **surveys and trends** and **up-to-date news** on online learning, teleworking, employability, and much more ...

GOVERNMENT

Training and Enterprise Councils performance indicators published

Lifelong learning minister Malcolm Wicks has recently published the latest performance indicators for Training and Enterprise Councils (TEC) and Chambers of Commerce, Training and Enterprise (CCTE).

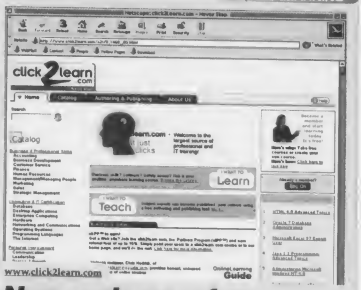
Commenting on the publication of TEC Performance Indicators for 1998–99, Wicks said: 'I am pleased that the numbers of young people and adults achieving an NVQ has continued to increase. I am also pleased to note that there has been a marked increase in the number of companies that have gained recognition as Investors in People. We are beginning to see evidence that the culture of lifelong learning is becoming accepted as the means of raising skill levels and responding to change in the workplace, and that lifelong learning is the means by which everyone can improve their lifelong chances. The development of a new Learning and Skills Council – bringing training and further education closer together, with a strong role for business and other partners – will enable us to consolidate and extend this progress in the future.'

This is the seventh annual series of performance indicators to be published. Some examples of the findings include the following.

- NVQs per 100 leavers have risen from 62 in 1997–98 to 66 in 1998–99.
- NVQ2s per 100 leavers have risen from 41 in 1997–98 to 42 in 1998–99.
- NVQ2+s per 100 leavers have risen from 55 in 1997–98 to 59 in 1998–99.
- NVQ3+s per 100 leavers have risen from 14 in 1997–98 to 16 in 1998–99.
- There has been a slight increase in achievement of NVQs by adults. NVQs gained per 100 leavers have risen from 32 in 1997–98 to 35 in 1998–99.

For further information contact the DfEE at (tel) 0171 925 5555.

ONLINE LEARNING



Name change for Asymetrix to click2learn.com, inc.

The change in name reflects the growing importance of the company's innovative new learning portal located at www.click2learn.com to the company's market-leading position in the online learning industry, as well as the integration of the company's existing products and services with the learning portal.

'Our goal for the company is to be the lifelong learning partner to the business professional, and this name change reflects both the importance of our learning portal in pursuing this goal and signifies our leadership position in web-delivered learning,' says Peter Kelly, managing director Asymetrix Europe. 'As the market leader in behind-the-firewall enterprise learning solutions with our learning management products, authoring tools and professional services, we see click2learn.com as a natural evolution to outside-the-firewall solutions of our product and service offerings. click2learn.com provides large corporations with thousands of titles as well as a learning management and authoring product in a hosted environment, and it gives small businesses and individuals a cost-effective and convenient way to access a diverse library of computing and business titles.'

click2learn.com, inc. is a leading provider of online enterprise learning solutions that enable organisations to author, deploy and manage Internet-based training and education.

For further information on click2learn.com solutions, contact click2learn.com at (tel) 0171 345 1500 or visit (website) www.click2learn.com

• SURVEY

Training pays – but the benefits aren't reaching those most in need

If you are a female part-time worker, a man in an occupation that is forecast to decline, work in a small business or are over 45 years old, you are the least likely to be involved in learning and skills development, which may affect your ability to earn more or remain employed in the future.

These are just some of the findings from the *1999 Skills and Learning Survey* published recently by Sussex Enterprise, the Chamber of Commerce, TEC and Business Link for Sussex. The survey sampled 1,600 residents from across Sussex, and examines qualification levels and people's attitudes to learning and training, as well as the barriers they face.

Gordon Brown, Chancellor of the Exchequer, recently commented that the UK could only work towards full employment if it provides investment to upgrade skills in the workplace. The major thrust of the current government policy is for people to take responsibility for their own training and development; it also aims to boost skills at NVQ2 level, help employers to identify needs and train their staff, and improve the education and training market. Evidence from the survey shows there is some way to go to meet these aspirations.

- Nearly two in five men (43 per cent) continue to work in occupations that are forecast to decline (for example, plant and machine operators and skilled craft workers) emphasising the need for readily accessible careers advice, twinned with re-training and re-skilling packages to give them new career choices.
- Distinct patterns are evident in terms of taking up training, studying and learning. Older workers (45 plus), the unemployed, workers in lower-valued occupations such as unskilled manual jobs and security guards, and less-qualified workers are all substantially less involved in learning and skills development. For this group, 30 per cent of respondents reported that lack of time was inhibiting future training and a further 11 per cent are held back by having to look after dependants.
- The Internet is emerging as a key source for people wanting information on training. Eight per cent of all respondents and 15 per cent of 18–24 year olds mentioned this channel. Other sources of information include colleges, libraries, job centres and careers services.

Mark Froud, director of economic research at Sussex Enterprise, says: 'This is a fascinating insight into the profiles of learners and non-learners in the south-east. Of most concern is the fact that workers in Sussex employed in jobs requiring few qualifications receive less training than those who are in higher grade – and higher paid – occupations. Older and lower-skilled workers are most threatened by the changing skills needs of the economy, but they are the least likely to be involved in training. Those who would most benefit from training are being excluded.'

For further information contact Alan Brooks, Sussex Enterprise at (tel) 01444 259225.

• RESEARCH

Feedback on feedback

News of a major piece of research, which provides illuminating and challenging insights into feedback processes in organisations, has just been announced. These results are the product of a two-year project conducted by Professor Christine Farrell of the Roehampton Institute, which was sponsored by a consortium consisting of the British Psychological Society, the Department of Trade and Industry, the Institute of Personnel and Development, SHL and the Roehampton Institute, London.

A major output from the research has been the production of a set of 'Best practice guidelines for 360 degree feedback'. This piece of work shows what can be achieved when professional bodies, academic institutions, commercial organisations and a government body come together to achieve a common goal – the advancement of best practice in human resources management in the UK.

Farrell, the project director, says: 'We need to ensure that HR practices are underpinned with sound foundations to give the best return on peoples investments. Research is the responsibility of everybody, not just academic and professional institutes. Only through a totally collaborative approach will best practice prevail.'

For further information contact Roy Davis, head of communications, SHL at (tel) 0208 335 8000.

• TELEWORKING

Teleworking reduces staff turnover and increases productivity

CSA

management consultants

A new CSA Management Consultants research report shows that many companies are missing out on the advantages of teleworking, which include reduced staff turnover and increases in productivity.

Keith Hughes, head of consulting at CSA, says: 'The figures simply can't be ignored. Teleworking almost guarantees reduced staff turnover – in one instance from 40 per cent to 3 per cent within eight months. And perhaps more importantly, 77 per cent of companies with teleworking projects report that productivity has increased by at least 45 per cent.'

Although teleworking is widespread through the US, UK employers are more wary of introducing working from a remote location. Currently, only 5 per cent of the working population in the UK are teleworking, though 60 per cent of executives without teleworking schemes expect to implement one in the next three years.

Hughes continues: 'With the creeping change in conventional working practices turning in to a gallop – from single parent families to increasing pressure to balance work and family – organisations simply can not think of teleworking as just a technological issue but should view it as an integral part of a human resources and business strategy.'

Employees also report the benefits of teleworking as including less interruptions, reduced time lost to travel, increased motivation and increased quality of life.

For further information on CSA's human resources services contact John Mitchell at (tel) 01256 818811.

SURVEY

Training: too little, too late, too lightweight

New research launched by The Industrial Society and *Training* magazine, partners in the TD2000 campaign, points to major fault lines in the way training is delivered, including the fact that it is:

- too little – only one-third of course attendees feel that training has made a big difference to their performance
- too late – over one-third of trainees (38 per cent) have never been asked by their personnel/training department if the course was useful
- too lightweight – only 2 per cent of employees attending training courses say their training has broken new ground.

Some 51% say they learnt very little as they already knew 'most' or 'quite a lot' of the content.

The findings of *Staying the course? A survey of trainers' views on training* are based on responses from over 2,500 workers, chosen at random, who have attended courses provided by a wide number of organisations. They were asked how the training provided by UK training and development departments benefited them. The survey also discovered the following.

- The biggest barriers to training are bad trainers (23 per cent) and poor tailoring (23 per cent).
- Some 60 per cent of the sample said training and development is keeping pace with their needs.
- Over three-quarters (86 per cent) said off-the-job training is worth the time away from work.
- On-the-job learning is top – 92 per cent said it was 'very' or 'quite' useful.
- Only 16 per cent of employees have had their learning styles assessed by their organisations.
- In only six out of ten (58 per cent) cases the personnel/training department had tried to find out how useful training had been.
- Less than half (46 per cent) of employees were supported by their line managers when they wanted to apply their learning in the workplace; but two-thirds of managers (67 per cent) did ask for feedback about the course and over two-thirds (69 per cent) said their line managers kept on top of their training needs.

Dr John Knell, head of research at The Industrial Society comments that: 'While our results contain some very positive messages about training, notably the volume of training taking place, and the generally positive views of the trainees, they also pose worrying questions for the HR profession and UK plc. Specifically only one-third of respondents believe that their training has made a big difference to their ability to do the job, and one-third believe it has made no difference at all to organisational performance. These findings should concern everyone trying to make the case for the positive impact that training and development has on the productivity and efficiency of UK plc.'

Staying the course? A survey of trainees' views on training, *priced at £25 plus p&p, is available from the Industrial Society Customer Centre at (tel) 0870 400 1000.*

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PROVEN TO WORK

• BUSINESS SCHOOLS

Report shows business schools are booming

The popularity and international recognition of the MBA (Master of Business Administration) degree is continuing to grow, with more than 30,000 students enrolled – according to a new report, published by the Association of Business Schools (which represents 100 UK business schools) in the UK.

The Association of Business Schools' *Pillars of the Economy (Developing World Class Management Performance) 1999* report analyses the latest trends in business education and shows that there has been a 5 per cent increase in MBA graduates since 1996. It says this trend is likely to continue with almost 12,000 students taking up places in 1998.

Postgraduates in business- and management-related subjects account for 16.4 per cent of all UK postgraduates students. In 1998/99 there were 62,549 people registered for postgraduate business and management programmes (both taught and research-based).

Business and management is the most popular choice for international graduates, representing 20 per cent of the total overseas postgraduate population. There has been a steady increase in non-UK student numbers during the past two years with a 4 per cent increase to 16,916 students in 1998/99.

Based on a series of average costs for course and living expenses, the combined annual revenue to the UK derived from the EU and other overseas students at undergraduate and postgraduate levels in UK business schools is just under £0.5 billion. UK business schools teach a further 10,000 international students in their own countries via partnerships with approved institutions, or distance learning, generating a further £40 million in exports.

The popularity of UK business studies courses is reflected in the enviable position that UK schools hold in the world rankings, particularly in comparison with their continental European counterparts. In a recent *Financial Times* survey of top full-time MBA degree programmes around the world, eight UK schools were in the top 50 and there were eight schools listed from the rest of Europe. Similarly, in the *FT* survey of executive education programmes, the UK had three business schools in the top 12.

For copies of Pillars of the Economy (Developing World Class Management Performance) 1999 *contact the Association of Business Schools at (tel) 0207 837 1899.*

• EMPLOYABILITY

Employability makes sense for employers

Insecure at work? Wondering where the next job might come from, and whether your skills are up to date? Actually, staying employable is good for you and your employer, and broadens your value right where you are.

Nevertheless, employers could be doing a lot more to secure the future employability of their workforce, according to a new report about to be published by the independent Institute for Employment Studies.

Many employers recognise that they can no longer offer security of employment to their employees. Instead they talk a lot about 'employability'. However, few do much more than exhort their workforce to update their skills. Where employers do attempt explicitly to support staff on issues of employability, their policies tend to:

- focus on a few staff groups and do not address the workforce as a whole
- smack of opportunism or necessity rather than deliberate strategy
- re-package existing career or development practices, rather than deliberately address the emerging needs of their workforce.

As co-author of the report, Penny Tamkin, comments: 'Those few employers who attempt to enhance the employability of their workforce do so for sound business reasons. Employability can benefit both employers and employees — and the smartest employers know it. Employability strategies can enhance the flexibility of the organisation to respond to cost pressures, can enhance staff morale, and can help the retention of the best. However, blanket approaches do not succeed; practices need to be tailored to an organisation's individual circumstances.'

Co-author Jim Hillage further states: 'If "employability" is to become anything more than a hackneyed catchphrase of the late 1990s, then employers have to adopt a far more concerted approach. To really engender a lifelong learning culture, employers have to work in partnership with government and individuals, to look beyond the skills required to do current jobs, and to develop the skills, knowledge and attitudes needed for the future as well. In many ways employers are the missing piece of the jigsaw. Without them there is no picture.'

Employers should be clear why employability is desirable. Major transitions affect everyone. When employees feel supported, loyalty and confidence are maintained, and the whole business benefits.

Developing employability, whether to sustain a more flexible workforce, or to restructure without losing key people or simply to retire workers gracefully, is more than just a good national policy. For employers, it acknowledges the position of employees as stakeholders in the future of the organisation, and where the value of the employee is genuinely recognised, business performance improves.

The study, based on research with employers who do work to improve their employees' employability, examines a range of policies used by employers. It puts forward a checklist to help employers develop a policy towards employability that meets their particular business needs.

The research was sponsored by the Institutes Research Club, a group of 30 leading UK employing organisations. It examines what employability means in practice, what employers are doing about it, and why and how best to put a comprehensive policy into practice. *For further information contact Penny Tamkin or Jim Hillage at (tel) 01273 686751. The report may be purchased from Grantham Book Services Limited at (tel) 01476 541080 or (fax) 01476 541061.*

Stress in the millennium: have you got the Y2K bug?

The end of an old year and beginning of a new one should be a time for reflection and anticipation. However, Stress Management Consultant **Carole Spiers** asks whether we will be looking at a clean slate for 2000 or peering over the edge of a looming precipice?

Computers may (or may not) be set to experience the Y2K bug – but what about the human cost of stress? A recent CBI Survey entitled 'Focus on Absence' cited that absence from work lost UK business £10.2 billion in 1998 (an average of £426 per employee) and that stress for non-manual workers was the second highest contributor to absence.

As we hit the year 2000, the workplace should be bracing itself for unprecedented levels of stress among employees who will be feeling the pressure at home, at work and at play. It's all very well to dismiss forthcoming festivities as a contagious frivolity, but will the pressure to have a good time result in extreme levels of stress or, in the worst cases, suicide?

Calls to professional helplines are already in full swing. A Samaritans report (issued October 1999) highlighted that the suicide rate among young men has risen by a staggering 40 per cent. The social pressure to spend, spend, spend and 'party like it's 1999' will push many people (both men and women) to extreme levels of stress-induced behaviour and PMT (pre-millennium tension).

The end of a year, and particularly the end of a thousand years, will exacerbate all the feelings that we usually experience, but even more so. We feel that, this time, all our expectations, all our New Year resolutions and hopes for the future, will be magically realised. This is rarely the case however. Depression, disappointment, anger and anxiety rapidly become the norm.

A balancing act

Whether it's stress at work (the feeling that all those loose ends must be tied up by a certain date) or the pressure of living with your extended family without respite for several weeks and the accompanying social and financial pressure your nearest and dearest bring, or whether it's the pressure to be the life and soul of celebrations, we all spend our lives doing a balancing act, just about keeping our heads above water.

However, the added pressures to 'enjoy' ourselves, to have 'the best time of our lives', to 'be loved' and to 'take part' … all of these elements will only build up, creating the sensation of losing control.

Instead of enjoying a brand new century, the feeling of guilt and being manipulated by outside forces is overwhelming. Guilt, because, instead of enjoying the hype all around and being a part of it, we feel despondent and isolated. Guilt that we cannot forget our problems; as hard as we try they only return twice as bad. Guilt that we cannot spend the money our families are expecting. And guilt that the ups and downs of our lives aren't in harmony with what the calendar is telling us to experience.

We could try to avoid the hype by travelling to a non-Christian country, where the millennium will pass by without a mention. We could try to put the whole thing in perspective – it's just another day after all, and no doubt it will still be raining! But if you are feeling the pressures of the aforementioned PMT, don't ignore them and be warned, you might end up suffering PMS (post-millennium stress) which, sadly, has no end in sight!

Carole A Spiers MIHE, MISMA is a RELATE trained counsellor and one of the first validated UK International Stress Management Association Trainers. She can be contacted at (tel) 020 8954 1593, (email) csa@stress.org.uk or visit (website) www.stress.org.uk/csa

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Diary dates

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Date & Venue	Event	Contact
7–8 December Brighton Metropole	Internet business 2000	Prometheus Tel: 01203 426450 Website: www.ibshow.com
13–18 December Watford	NLP intensive practitioner (with Julie Hay)	AD International Freepost 1195, Watford WD1 4WD Tel: 07000 234683; Fax: 07000 234689
1–3 February Windsor	Problem solving and decision making workshop	Kepner-Tregoe Ltd, Bentley House, 13–15 Victoria Street, Windsor, Berkshire SL4 1HB Tel: 01753 856716; Fax: 01753 854929
9–10 February Wembley Exhibition Centre	Softworld human resources and payroll	Hotline: 07000 763 896; Fax: 0181 974 5188 Email: softworld@softworld.com Website: www.softworld.com
6–7 March Central London	Managing people workshop	Communications Skills Europe Tel: 020 7670 0500; Fax: 020 7670 0515 Website: www.cseltd.com
14–15 March Coventry	Networked learning future	Cable & Wireless plc Tel: 0500 345678
28–30 March Manchester	Project management workshop	Kepner-Tregoe Ltd, Bentley House, 13–15 Victoria Street, Windsor, Berkshire SL4 1HB Tel: 01753 856716; Fax: 01753 854929
19 April Royal Albert Hall	Institute of Directors 2000 annual convention	Director Events, 116 Pall Mall, London SW1Y 5ED Fax: 020 7766 8789
25–27 April Central London	Training techniques for trainers – workshop	Communications Skills Europe Tel: 020 7670 0500; Fax: 020 7670 0515 Website: www.cseltd.com
5–9 June London	Management development and information conference and exhibition	Venture Marketing Group Tel: 0181 394 5180 Website: www.mdishow.com

Mike
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I've been learning about learning

Peter Honey *BA (Psych), D Litt, Dip Ed, FIMC, FIPD, is a chartered psychologist and management consultant. He can be contacted at (tel) 01628 633946, (fax) 01628 633262, (email) peterhoney@peterhoney.co.uk or visit (website) www.peterhoney.co.uk*

Peter Honey shares the things he has learned while participating in the learning declaration group.

A year has passed since the learning declaration group (John Burgoyne, Ian Cunningham, Bob Garratt, Andrew Mayo, Alan Mumford, Michael Pearn, Mike Pedler and myself) published its declaration to 'stimulate dialogue about learning'. During that time, reactions have poured in from all over the world – thanks to the magic (to me) of email. Most of the feedback has been supportive but plenty has been critical, both of what is and isn't in the declaration. It is often contradictory; some think the declaration too long, others find it too short; some think the declaration too vague, others find it too prescriptive; some think the declaration says nothing new, others find it too radical.

An expanded group is busy learning from the feedback and producing a new, improved declaration (sorry to make it sound like soap powder!) to be launched at an AMED conference on 20 January. Not everyone in the group was immediately enthusiastic about producing a new declaration, fearing that once the precedent was established, we'd have to produce one every year! But the majority of us felt that *not* to produce another one would be tantamount to ignoring excellent feedback and passing up an intriguing learning opportunity. So, at the time of writing we are on our third draft and the new declaration is slowly taking shape.

Rather than pre-empt the new declaration, I'd like to share some of the thought-provoking things I have learned/relearned from the deliberations of the group. I appreciate that these issues may not grab you in quite the same way, and I must stress they are my personal insights and not necessarily representative of my colleagues' learning (sounds like one of those disclaimers you see in all good car parks!). Here are six of my 'lessons learned'.

While it is common to talk about barriers (or blockages) to learning, I now prefer to think of them as obstacles. The difference, I believe, is significant. Barriers are designed to be difficult, if not impossible, to overcome. Obstacles, on the other hand, are more likely to tempt people into finding ways to overcome them. From now on, I'm going to discourage people from being negative about seemingly insurmountable barriers and encourage them to be positive about the challenge of overcoming obstacles.

Similarly, for years I've been uncertain whether unlearning, relearning and learning were really different. *All* learning involves making connections, so when we unlearn are we un-connecting or re-connecting? If the former, then unlearning precedes relearning. If the latter, then unlearning is merely more learning. I now think it is better to think of pattern changes that go relentlessly forwards, rather than a stage that goes backwards before it is possible to go forwards.

I'm far clearer than I was about the difference between learning as a process and learning as an outcome. The process is essentially internal and amoral. The outcome is essentially external (that is, changed behaviour) and always has a moral dimension. Both the process and the outcome are important. I acknowledge that previously I have been guilty of placing too much emphasis on the outcome (a behaviourist failing – or, some would say, strength) at the expense of the process.

I have also been helped to sort out my thinking on unconscious and conscious learning. Unconscious learning is a natural process with many attractions – it is relatively effortless and inexpensive. However, unconscious learning is hard to share and challenge (two vital ingredients of a learning organisation or society) so it needs to be supplemented with something more conscious and deliberate. The act of describing unconscious learning automatically makes it conscious. I'm all for unstoppable, unconscious learning (it is nonsense ever to describe anyone as a non-learner), and I am also all for processes that help us to convert learning from a tacit to an explicit state. It is for me an 'and' not an 'either/or'.

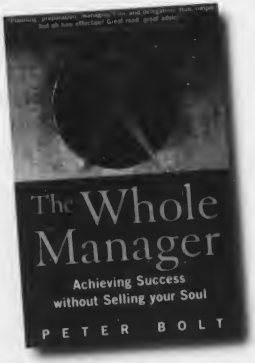
My colleagues in the learning declaration group have broadened my horizons about the importance of learning. Previously I viewed it from an individual, group and, at a stretch, organisational point of view. I have been taken to the top of a mountain and shown how vital learning is for democracies, communities, societies and nations. Nowadays I am starting to sound less like an analytical psychologist and more like a passionate politician (the sort with integrity, of course!).

Finally, I'm much happier about the moral issues that are inextricably intertwined with learning. I've always been clear that it is just as easy to learn 'bad' things as it is to learn 'good' things, but less clear what to do about it. I now understand why it is essential in any organisation, community or society to have continuous dialogue about what constitutes 'good' and 'bad'. A democratic society agrees its own rules after listening to all the arguments – particularly those from minorities. The learning declaration group has itself been an exemplar of a truly democratic process. One of our visitors (an academic) even went so far as to say that we came closer to the Socratic method than any other group he had encountered!

I hope that when you read the new declaration it will fire you up – even though you have not been a participant in our heart-searching discussions. The remedy is simple; form your own learning declaration group and start talking!

Books

This month's new titles include those that relate to **effective management**, **psychometrics** and **HR best practice**.



The Whole Manager: Achieving Success without Selling your Soul

Peter Bolt
Oak Tree Press, Merrion Building, Lower Merrion Street, Dublin 2, Ireland
Website www.oaktreepress.com
ISBN 1 86076 133 X
Hardback £18.95

Some books seem to be especially of their time, and this is one of them. Peter Bolt's message that it is possible to be an effective manager without sacrificing integrity, home and family life or sanity as pressure mounts and work demands escalate, is a welcome one.

The originating premise for the book is not a new one but it certainly reflects a real and continuing issue – that of competent and talented people, excellent at their work, who are promoted to manager status, then don't know what to do next. We all recognise the scenario and sympathise with the 'victims'. What Bolt's ideas offer these managers on first appointment is a range of practical tips and techniques that will help them to get the most out of themselves. In fact, the book is, among other things, about managing oneself, setting priorities, managing other people (in all directions) and getting the balance right between work and personal life. The book is slim (142 pages) with ten chapters, seven entitled 'Managing …'. The other three chapters deal with getting things done, delegation and leadership. Obviously, with this range of subjects and in this space, nothing is dealt with in depth. Indeed in some instances, the advice given is almost 'folksey' and in one or two cases superficial.

> It is possible to be an **effective manager** without sacrificing integrity, home and family life or sanity

Despite this, the whole book teems with useful tips, suggestions and ideas. Together, these offer a very useful *modus operandi* for new managers. Indeed, while by no means a 'new' manager myself (!), I found many of the ideas refreshing, thought-provoking and useful. The style is clear and easy, and written directly to the reader. The writer's enthusiasm and belief is palpable. A good read, and a source of excellent advice for the target readership. ***DB***

Ratings		*Clarity*	****
Innovation	***	*Usability*	****
Readability	****	*Value*	***

Your reviewers...

Diane Bailey
of Diane Bailey Associates, Rochdale, can be contacted at (tel) 01706 659299

Leslie Rae
of Elray Associates, can be contacted at (tel) 0114 248 3725

Steve Holman
is head of Management Studies at St Martin's College, Lancaster. He can be contacted at (tel) 01524 384672 or (email) s.holman@ucsm.ac.uk

Modern Psychometrics (second edition)

John Rust and Susan Golombok

Published by Routledge,
distributed by Psychology Press, International Thomson Publishing Services, Cheriton House, North Way, Andover, Hampshire SP10 5BE
Tel 01264 343071 Fax 01264 343005
ISBN 0 415 20340 6 *Hardback £55.00*
ISBN 0 415 20341 4 *Paperback £17.99*

This text is 'academic' and not a lightweight read. However, it is a definitive text that reflects the importance of the area. It is possible to dip into the book and study key aspects because of the clear contents section and the easy-to-follow chapters.

Psychometric testing and assessment is now part of everyday life from school to employment and social. This relatively new science is concerned with how to maximise the quality of such assessments.

Managers, trainers and HR specialists need to grasp the importance of the tools of their trade, and the contribution that this book makes is important. It combines theory with practice, although it is not a beginner's text.

There is an excellent history and background to the subject area, which rapidly moves into explanations of critical areas such as 'Bias' and 'Personality theory'.

I would have preferred a larger typesize and more spacing to assist any learning and study, but the layout is clear, with sound headings, bold print and clear sections/chapters.

The book is professionally referenced with supporting index, bibliography, figures and tables. Part two provides a practical step-by-step guide to the development of a psychometric test. It

> Psychometric testing and assessment is now part of **everyday life** from school to employment and social

enables anyone wishing to develop their own test to plan, design, construct and validate it to a professional standard. This is a particularly useful approach to really understanding how tests work and, of course, moving towards customising personal needs in the truest sense.

For those candidates studying for the British Psychological Society's Certificates of Competence in Testing, the text is a suitable companion and ideal reference document. The authors are both distinguished and experienced academics who have produced a classic text in the field. ***SH***

Ratings			
Innovation	★★★	*Clarity*	★★★★
Readability	★★	*Usability*	★★
		Value	★★

What's hot online?

amazon UK's top 20 business and finance bestsellers

1 **The Motley Fool UK Investment Workbook** — Berger, D, And Jackson, B — Boxtree *Paperback*

2 **The E-Commerce Book: Building The E-Empire** — Korper, S, And Ellis, J — Academic Press Inc. *Hardback*

3 **The Motley Fool UK Investment Guide** — Berger, D, Gardner, D, And Gardner, T — Boxtree *Paperback*

4 **Customers.Com** — Seybold, P — Century/Arrow *Hardback*

5 **Accidental Empires** — Cringely, RX — Penguin Books *Paperback*

6 **E-Business: Roadmap For Success** — Kalakota, R, Robinson, M, And Tapscott, D — Addison Wesley Publishing Company *Paperback*

7 **The New Alchemists** — Handy, C, And Handy, E — Hutchinson *Hardback*

8 **Trading Online: A Step-By-Step Guide To Cyberprofits** — Patel, AB — Pitman Publishing *Paperback*

9 **Strikingitrich.Com** — Easton, J — McGraw-Hill Book Company *Hardback*

10 **Understanding Organisations** — Handy, CB — Penguin Books *Paperback*

11 **Successful E-Commerce In A Week** — Howell, D — Hodder & Stoughton General *Paperback*

12 **Permission Marketing** — Godin, S — Simon & Schuster *Hardback*

13 **Unleashing The Killer App: Digital Strategies For Market Dominance** — Downes, L, Mui, C, And Negroponte, N — Harvard Business School Press *Hardback*

14 **The Innovator's Dilemma** — Christensen, CM — Harvard Business School Press *Hardback*

15 **Managament And Organisational Behaviour** — Mullins, L — Financial Times Management *Paperback*

16 **Business At The Speed Of Thought** — Gates, B — Penguin Books *Hardback*

17 **The Complete Idiot's Guide To Project Management** — Baker, S, And Baker, K — Alpha Books *Paperback*

18 **The Motley Fool Guide To Investment Clubs** — Goodson, M, And Berger, D — Boxtree *Paperback*

19 **The Fifth Discipline** — Senge, PM — Century/Arrow *Paperback*

20 **Behaviour: An Introductory Text** — Huczynski, A, And Buchanan, D — Prentice Hall Europe *Paperback*

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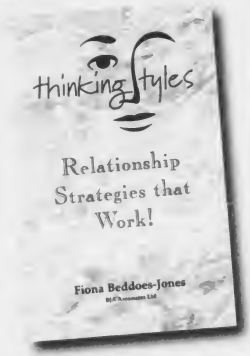


Thinking Styles: Relationship Strategies that Work!

Fiona Beddoes-Jones
BJA Associates Ltd, Old Blue Dog, Stainby, Lincolnshire NG33 5QT
Tel: 01476 861010
Website: www.thinkingstyles.co.uk
ISBN 0 9535 3100 7
Paperback £9.99

The author of this interesting 113-page book is part of the company that published it, obviously feeling that it contained a message that needed to be communicated. The basis of the book is 'Thinking Styles', a name registered by the author. According to the book, this concept is based on the work of Bandler and Bandler in the US, who produced some of the first building blocks of NLP in the 1970s.

The Thinking Styles core concept is contained in 13 chapters of the book, each dealing with either one sensory thinking style each (four) or two 'other' thinking styles (nine). These 22 styles will be recognised easily as those we use when processing information, and have been discussed for many years. (They are even mentioned in some of my books!)

The senses described here are visual, auditory, kinaesthetic and digital thinking or processing. The 'other' thinking chapters deal in a comparative way with:

- detail conscious versus Big Chunk strategic
- left and right brain
- procedures and options
- moving away from problems and towards outcomes
- reactive and proactive
- internal and external referencing
- self and others
- match and mismatch, and
- sameness and difference.

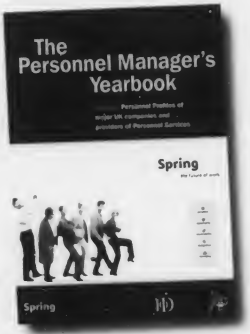
None of this is new, but it is presented in a very readable, clear and concise manner, bringing a number of sensory and stylistic attitudes together in one place.

Readers are invited to complete an 80 item questionnaire and send it in to the company for assessment. To do this, the reader is directed to (website) www.thinkingstyles.co.uk where the questionnaire can be found and a charge made for the service. The questionnaire seeks the completer's views on the scale 'Strongly agree' to 'Strongly disagree' on such statements as: 'My ideal job would be of a technical nature'; 'I sometimes get myself lost in my own thoughts'; 'I like taking the time to be nice to people' and so on.

The assessment of the questionnaire does not appear to have been validated; if this is the case, it must be considered as a discussion starter rather than a scientific assessment.

A useful book that will give an interesting insight into the ways people think and the resulting barriers they might raise, but care must be taken in accepting the material at face value. ***LR***

Ratings		*Clarity*	★★★
Innovation	★★★	*Usability*	★★/★★★
Readability	★★★★	*Value*	★★★



The Personnel Manager's Yearbook 1999/2000

AP Information Services 1999, Marlborough House, 298 Regents Park Road, London N3 2UU
Tel: 0181 349 9988
Fax: 0181 349 9797
Email: personnel@gap-info.co.uk
ISBN 1 9022 0212 0
Paperback £89.50

This is hefty A4 volume contains 1,300 pages of key contact details in top UK companies, and networking information on over 4,000 advisers and suppliers. It is a valuable directory and reference document, and contains a new 30-page section on employment legislation which provides an overview of trends and practices in the UK HR industry. It also gives valuable information on the Working Time Directive.

The yearbook is now in its 15th year and has included changes in over 75 per cent of its entries. Additionally, it has incorporated a sister publication entitled *The Human Resource Management Yearbook*.

This is a hugely valuable reference document that also contains many lively advertisements from agencies and so on. Anyone engaged in competitor analysis or relocation research would find the text useful, as indeed would any information seeker in respect of company information or geographic data. ***SH***

Ratings		*Clarity*	★★★
Innovation	★★★	*Usability*	★★★★
Readability	★★★	*Value*	★★★

Cranfield: Management Research in Practice; Human Resource Excellence Report

Shaun Tyson and Noleen Doherty
Financial Times Management
Tel: 0161 245 3327
ISBN 0 273 63887 4
Paperback £95

This A4 book, written by two authors and accomplished academics from the Cranfield School of Management, benchmarks best practice in human resource management. It is part of a 'Cranfield' series which intends to combine the best in primary research with the Financial Times Management publishing organisation.

The text concerns the Human Resource (HR) awards, which were devised by the Martin Leach Publishing Group and a group of sponsors. The results followed a comprehensive, objective auditing process designed by Cranfield and completed by participating organisations.

The participants of the awards scheme completed a questionnaire consisting of around 100 main questions plus a substantial number of probe questions designed to gather more in-depth information. There were 13 sections in the questionnaire designed to cover the spectrum of HR activity.

Each section commences with an executive summary which gives guidance on the criteria required to demonstrate and achieve success, and there are references, tables and conclusions which give an accurate analysis of each area.

The report gives an opportunity for HR professionals to compare and contrast their own organisations against those that engaged in the scheme, and to review the highly impressive 'Self-assessment questionnaire', which is a model of good practice in its own right. The layout and content of the report highlight critical areas of managerial concern and give an insight into best practice. ***SH***

Ratings:			
Innovation	★★★	*Clarity*	★★★
Readability	★★	*Usability*	★★★★
		Value	★★

The Excellent Manager's Companion

Philip Holden
Gower, 1999. Gower House, Croft Road, Aldershot, Hampshire GU11 3HR
Tel: 01252 331551
Website: www.gowerpub.com
ISBN 0 566 07947 X
Hardback £29.50

This hardback book (size 216 x 169 mm) is good value for money. It has 208 pages of easily accessible information that is valuable, stimulating and topical. It would make a perfect gift for a discerning manager who is intent on keeping up to date on current business issues and who wants to gain knowledge in the areas covered. Furthermore, it gives the added and invaluable dimension of mischief and fun from quotes that make the subject areas alive, debatable and exciting.

This companion also adds an academic opportunity for the reader in the form of further reading and books to turn to when more detailed guidance on a specific topic is required. There are 21 chapters exploring key topics ranging from corporate culture to customer orientation and from innovation to influencing people. The quotations from many and varied 'gurus' are beautiful and give a rounded taste of the subject. The text is lively and entertaining with contributions/ examples from Walt Disney, Confucius, Dilbert and Drucker.

> There is plenty in the text **for those who wish to impress** others with clever quotations!

The book is designed to assist quick reference, and dipping in is easy and rewarding. Each chapter is organised around standard sections which follow the same format thus increasing reader confidence with frequent usage. The sections are:

- questions for self-analysis
- a step-by-step guide to best practice
- the ten 'don'ts'
- pertinent quotations
- summaries of key books and articles
- a case study, and
- a glossary of terms.

Philip Holden's style is comfortable and easy to read. There is plenty in the text for all manner of readers and for those who wish to impress others with clever quotations! ***SH***

Ratings			
Innovation	★★★	*Clarity*	★★★★
Readability	★★★★	*Usability*	★★★★★
		Value	★★★

Covey on leaders
a new relevance for a new age

In an interview with **Martin Delahoussaye**, **Dr Stephen Covey** talks about his forthcoming book on leadership and explains how trainers can use the underlying principles to exert a greater influence on corporate strategy.

MD: *You are presently engaged in writing your latest book,* The Four Roles of Leadership. *What's the main focus of the book?*

SC: Well, the focus is in developing leaders as distinguished from managers. Management is a function of position, but leadership isn't. It deals with a different mindset and a different skill set. This skill set has become increasingly important in today's world because of what technology has done and what the global marketplace is doing. In the book, I stress the need to have more empowerment of people so that we can produce better quality at lower cost in order to compete. The kind of empowerment that I advocate requires strong relationships built on trust. So the first role of leadership is modelling trustworthiness. This is a critical leadership role because out of it develops personal moral authority and this enables relationships of trust to form.

> Interdependency is the order of the day and unless people have the skill set and the mindset of this kind of interdependency, it'll be like trying

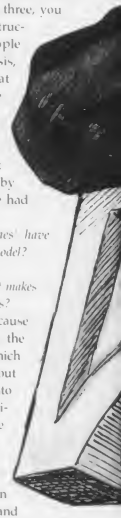
The next leadership role is to establish common criterion as to what matters most – that is, what are the most important areas of activity. Many organisations have not come to a common criterion of activity, and that is why executives and most workers literally spend half their time doing things that are urgent but not important.

The third role of leadership is to institutionalise this moral authority in order to build the principles into your structures and your systems so that they're not dependent upon people. This is the corporate vision within and around which people work. And it's the role of the leader to create and reinforce it. When you do that, then you have created a powerful reinforcement of empowerment that supports people and that taps into their talents, their energies and their intelligence.

Dr Stephen Covey *is vice-chair of Franklin Covey. He can be contacted by visiting (website)* www.franklincovey.com

MD: *Why have you chosen to cover what are already well-known and established principles of leadership?*

SC: Well, they are established principles but we live and operate in different times and these roles have taken on even greater importance. Especially the fourth role which is, essentially, the tood of the other three. That is the role of releasing human potential by empowering people. In the first role you build trust. In the second role you come to a shared vision and value system so you have a common criterion in making decisions that people buy into. Then in role three, you institutionalise those into your structures and systems so that people experience, on a day-to-day basis, constant reinforcement of what matters most and then those three essentially create the environment which empowers or releases the potential, the talent and the intelligence of the people. So they're not being restricted by bureaucrats or by a lot of obsolete policies that once had relevance in an old age.



MD: *So you believe 'different times' have created the need for a new leadership model?*

SC: Yes I do.

MD: *What is it about your model that makes it different from other leadership models?*

SC: Well, I call it a new model because it's inter-disciplinary. It embraces the character concept of leadership, which is the first of the habits I talked about in *Seven Habits*, but then it goes into organisational character and confidence so that you create institutionalisation. You have a formalisation of the principles themselves. And it's these principles that hold the organisation together in times of rapid change and growth.

MD: *You mentioned* Seven Habits *and this prompts me to ask whether the book would feature the same seven habits if you were writing it today?*

SC: Yes, I would focus on the same seven because they're all principles that are universal. For ➤

ovey on leaders
ew relevance for a new age

nterview with **Martin Delahoussaye**, **Dr Stephen Covey** talks about his forthcoming book on leadership and explains how trainers can use the nderlying principles to exert a greater influence on corporate strategy.

MD: *You are presently engaged in writing your latest book,* The Four Roles of Leadership. *What's the main focus of the book?*

SC: Well, the focus is in developing leaders as distinguished from managers. Management is a function of position, but leadership isn't. It deals with a different mindset and a different skill set. This skill set has become increasingly important in today's world because of what technology has done and what the global marketplace is doing. In the book, I stress the need to have more empowerment of people so that we can produce better quality at lower cost in order to compete. The kind of empowerment that I advocate requires strong relationships built on trust. So the first role of leadership is modelling trustworthiness. This is a critical leadership role because out

endency is the order of the day and ss people have the skill set and the this kind of interdependency, it'll be g ... tennis with a golf club.'

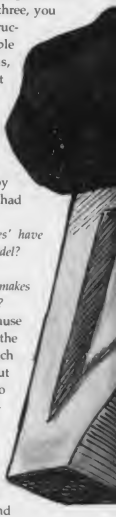
of it develops personal moral authority and this enables relationships of trust to form.

The next leadership role is to establish common criterion as to what matters most – that is, what are the most important areas of activity. Many organisations have not come to a common criterion of activity, and that is why executives and most workers literally spend half their time doing things that are urgent but not important.

The third role of leadership is to institutionalise this moral authority in order to build the principles into your structures and your systems so that they're not dependent upon people. This is the corporate vision within and around which people work. And it's the role of the leader to create and reinforce it. When you do that, then you have created a powerful reinforcement of empowerment that supports people and that taps into their talents, their energies and their intelligence.

MD: *Why have you chosen to cover what are already well-known and established principles of leadership?*

SC: Well, they are established principles but we live and operate in different times and these roles have taken on even greater importance. Especially the fourth role which is, essentially, the food of the other three. That is the role of releasing human potential by empowering people. In the first role you build trust. In the second role you come to a shared vision and value system so you have a common criterion in making decisions that people buy into. Then in role three, you institutionalise those into your structures and systems so that people experience, on a day-to-day basis, constant reinforcement of what matters most and then those three essentially create the environment which empowers or releases the potential, the talent and the intelligence of the people. So they're not being restricted by bureaucrats or by a lot of obsolete policies that once had relevance in an old age.



MD: *So you believe 'different times' have created the need for a new leadership model?*

SC: Yes I do.

MD: *What is it about your model that makes it different from other leadership models?*

SC: Well, I call it a new model because it's inter-disciplinary. It embraces the character concept of leadership, which is the first of the habits I talked about in *Seven Habits*, but then it goes into organisational character and confidence so that you create institutionalisation. You have a formalisation of the principles themselves. And it's these principles that hold the organisation together in times of rapid change and growth.

MD: *You mentioned* Seven Habits *and this prompts me to ask whether the book would feature the same seven habits if you were writing it today?*

SC: Yes, I would focus on the same seven because they're all principles that are universal. For ➤

ship:

instance, the first habit is the principle of responsibility and taking initiative so the more things get complicated, and the more they change, the more you need people who will take responsibility for their response and take initiative to make good things.

The second one is, begin with the end in mind. Basically it's the concept of establishing a common criteria by which you make decisions. You know, a vision or a mission that underpins the value system. This has become even more important in today's complex world because technology and the globalisation of markets have given people access to so much more information. If they don't have common criteria by which they make sense out of that information and a common purpose to work towards, it will be total chaos from the beginning.

'The training person must be

than to their own organisation'

The third habit is first things first; decide what matters most and then to keep to it. That's the institutionalisation habit, so you're not just saying what it is, you're really doing it. In a sense the seven habits are what you are, the four roles are what you do.

MD: *The world is a different place compared to when* Seven Habits *was first published. Does this place any greater emphasis on any one of the habits?*

SC: I would say greater emphasis on them all. Because, as I said, they're principles not practices. If you didn't have as much change then practices might work but with change people have to take responsibility to choose their reaction. Which practices will apply in their situation will differ constantly. Therefore, they have to have a principle that is universal and timeless and that does not change. You can then allow people to decide what practice is appropriate.

MD: *Technology is constantly moving the goal posts. We need to bring products to market faster and at lower cost. This is an entirely new business paradigm where collaboration and partnering seem to be an important part of the mix. Do you have a perspective on leadership training in this period of rapid and continuous change?*

'The key is to develop moral authority inside your own circle of influence'

SC: Yes, it's to reinforce your thesis. That is, interdependency is the order of the day and unless people have the skill set and the mindset of this kind of interdependency, it'll be like trying to play tennis with a golf club. In other words, they have an independent mind but they're dealing with an interdependent reality. Take information; look how interdependent information systems have become. Well, trainers need to develop this interdependency in the human element not just in the information side.

The technical side has to be built so that people learn to listen to each other, to build trusting relationships, to synergise rather than to compromise, to produce better alternatives than what either person proposed initially. This whole process is accelerating today because of all of the mergers, the acquisitions, the alliances, the collaborations that must take place in order to, as you said, produce faster and better. Therefore, the real role of training today for people in positions of influence or who want to exercise influence is the skill set and the mindset of interdependence – not independence and obviously not dependence.

MD: *If the role of the leader needs to change is there a corresponding change in our definition of a leader? Can leaders exist in the middle or even lower down in the organisation?*

SC: Yes they can and, like you say, people in the middle or even at the lowest end of the organisation can exercise leadership. All it takes is someone who is proactive, takes initiative and builds a relationship, gets some kind of an agreement and acts upon it. That person will find their circle of influence will get larger. Look at Gandhi – Gandhi is a beautiful illustration. He never was elected, never was appointed a leader but he was the leader of India. He brought about the institutionalisation of a new constitution so it was no longer dependent on him. The key is to develop moral authority inside your own circle of influence until it gets larger. I have all kinds of anecdotal evidence of entire transformation of cultures starting with the person at the low end.

MD: *And what about people who work in organisations, maybe bureaucratic organisations, maybe public service sector organisations, where visionary-inspired leadership isn't present. You believe it is possible for them to take the initiative and influence the culture from within?*

SC: Absolutely. In fact if they don't take that viewpoint, they will become part of the problem that they're decrying. But if they will do what you just said and take initiative and take responsibility, their circle of influence will get larger. The reward will come from the marketplace, whether it's an internal or external marketplace because the marketplace is pragmatic. It rewards what works and when this begins to work, their circle of influence gets larger. If you didn't have a marketplace then you'd have a feudal system where the king is in charge, where might makes

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right. But because you are accountable to a marketplace, that which makes might right, makes might.

MD: *OK, but there is a great deal of literature on this notion of free spirit innovation or intrapreneuralism (internal entrepreneurs). But, let's say you're a training manager and you recognise the need to develop these traits. Your organisation has traditionally held to a culture of conformity. Aren't you going to face an uphill struggle to bring about change?*

SC: Of course, I never said it would be easy. First of all, though, I think that the training person must be more loyal to their professional principles than to their own organisation. Most of the training people that I work with have become seduced by their culture and by the politics of their own organisation, and unless they are more loyal to the principles and have this emotional independence, they will not be able to serve their organisation as well. All they'll do is become a functionary – and the capability that you're talking about, to really stir up and bring about change; they won't be able to be a catalyst for, because they themselves are not a model of it.

MD: *Would they need to step outside the organisation to achieve this?*

SC: No. I think that they can do it inside. I think it's a little more difficult but they can do it if they're courageous, very courageous, and also very empathic. That means they can describe the executive's point of view better than the executive can, and then come up with another that is better than that point of view.

Through this approach they can influence. I know many human resource people and trainers that do this very thing; it puts them into the throne room, and once there, they're seen as a person that is very professionally and emotionally independent. If the human resource professional, the training professional is truly, emotionally, economically, intellectually independent and not seduced by the surrounding culture, they can become extremely powerful change agents. If they learn to be empathic (that's habit five, incidentally), so that they understand then move towards synergy (habit six) they can literally help bring the marketplace better into the workplace than anyone else has done it. I've seen people do that. These are listened to, they influence all kinds of policies and procedures and structures and systems, and they help create an environment that really nourishes entrepreneurism and innovation.

MD: *Presumably, this needs to happen over time and in small steps?*

SC: You're right. Sometimes they have to create an environment through pilot programmes or experimental programmes so that they are

> 'Develop integrity as a higher value than loyalty – or put another way, view integrity as the highest form of loyalty'

legitimatised in a bureaucracy. Sometimes they just go ahead and do it; they don't get permission at all.

In doing it, if it works well, boy, that person's circle of influence expands tremendously. If the culture is made up of insecure, threatened people, they'll try to step on that person, but if the marketplace is pragmatic and rewards productivity and low cost and high quality, those people will be the ones whose jobs will be at risk, not the entrepreneurial, innovative spirit. So trainers need to model themselves in their own methodology, their pedagogy, the way they design programmes, the way those programmes are integrated inside the organisation with the other systems so it's an ecological fit. If they think this way, if they think conceptually and strategically and have a lot of personal courage because of their personal security, they can become tremendous change catalysts. I train trainers all the time and this is the essence of the council that I give them: develop integrity as a higher value than loyalty – or put another way, view integrity as the highest form of loyalty.

They can do it on an experimental basis initially and if that works then they can begin to apply it at a wider level. Once they get into the throne room and they're really respected, I'm telling you, they can make a huge difference.

MD: *But many organisations structure training under the HR umbrella where it is seen as just one function out of several. It has been an uphill struggle to position training strategically.*

> 'The real role of training today for people in positions of influence or who want to exercise influence is [illegible]'

SC: I know, but it's because they've been cowered too much. They've been labelled and people say, 'Well, they're a staff person, what do they know about strategic issues and bottom line issues?' And that's why they need to be more empathic. The more they understand and talk the language of the executive decision maker and the bottom-line orientation in the marketplace, the more they will succeed in getting noticed. They can become very valued members of the executive team if they will follow this path. They'll end up in positions of influence and not just seen as the trainers out there designing and implementing training programmes based on some strategy that isn't really market orientated.

In the final part of her extended article, **Linda Holbeche** examines the 'how' of training strategies – planning for success.

Bonding training to strategy

Part three

'The challenge ... is the effective implementation of strategy – getting people to do the right things to make strategies happen'
Noel Tichy

In my previous two articles we have considered the *what*, *why* and *who* of training strategies. In this final article, we will consider the following questions.

- *How* are we going to achieve what we are trying to achieve? (What approaches and methods shall we use? What resources will we need?)
- *How will we build flexibility into our plans* so that we can respond to needs that emerge? (What obstacles will we have to overcome? What contingencies will we employ? How will we continue to ensure that we are on the 'right' track?)
- *How will we know we've arrived?* (What are our goals? What difference will they make to the business? What targets will we set? What will be our success criteria? How will we measure our success, especially when we are providing behavioural rather than technical training?

Approaches and resources

In answering the question 'How are we going to achieve what we are trying to achieve?', the first stage is to carry out an analysis of what needs to be done. Having identified the training priorities, the next stage is to set goals, with measurable milestones. The third stage is to identify possible approaches and work out their resource implications.

Increasingly, the idea that training is an off-the-job classroom-based experience is becoming outdated. Training methods need to keep pace with the speed of change but also offer a variety of ways of learning so that individuals can ideally learn in the way that suits them best.

Interactive technologies make it possible for people to learn a whole range of job-related skills at their desks on a just-in-time basis. Learning resource centres such as Standard Life's Open Access Development Centres offer a wide variety of formats for acquiring both 'hard' and 'soft' skills. Increasingly, mentoring is used as a means of developing the skills of senior staff who may need to learn interpersonal and leadership skills. In many organisations, distance learning is the primary means of enabling people to pursue qualifications.

The training function needs to decide the range of development activities it will undertake and the blend of in-house or external courses. Decisions such as these are likely to reflect the current skill levels and availability of internal trainers, as well as the needs of delegates for exposure to other experiences and approaches. Similarly, the pros and cons of residential versus non-residential training need to be weighed so that the relatively higher costs of residential training can be justified by specific objectives, such as the development of employee networks.

The mode of delivery, whether through training courses, self-study materials or computer-based training, should ideally be chosen to reflect purpose and appropriateness rather than cost alone. Similarly, some organisations believe that all training materials should be bespoke and tailored to their unique circumstances, it only for branding purposes.

The merits of developing tailored products and their related costs should be weighed against using off-the-shelf approaches which lack the organisational language but are nevertheless relevant.

The choice of existing versus new suppliers will again depend on quality, the need for change and variety versus the need for continuity.

The relative trade-offs of different approaches should be debated with internal clients so that a joint decision is arrived at in which all parties feel ownership. The respective roles in implementation, such as line managers providing follow-through from training, should be agreed up-front.

Building in flexibility

Strategic planning is a key tool for HR and the training function. This is the apparently logical process through which the organisation works out answers to the questions 'Where do we want to be in three to five years time?', 'Where are we now?' and 'What gaps need to be filled in terms of knowledge and skill to help us get there?'

Tony Grundy[1] defines HR strategy as 'the plans, programmes and intentions to develop the human capability of an organisation to meet the future needs of its external and internal environment'.

Training strategy may be planned, emergent or some combination of these. Sticking rigidly to training plans may mean that when things change, the training is no longer relevant. Similarly, a lack of planning can lead to chaos and a failure to produce recognisable achievements. The dilemma is how to develop plans that can flexibly accommodate change but still offer a coherent set of outcomes. Whether a formal or informal approach is used, the important thing is to keep the plan simple.

> Pressure to **prove that development activities add value** is usually at its worst when business results mean that every item of expenditure needs to be justified

Research suggests that many training teams do not take a planned approach. Some HR teams may prefer working in an emergent way. Others may fear criticism of being seen to create their own policy in the absence of business strategy on the one hand or being seen to drive business strategy on the other. Yet research by Tyson and Witcher[2] as well as by Grundy suggests that emergent HR strategy may be damaging to organisational effectiveness.

Other research projects suggest that the more planned and timely the implementation of HR strategies, the more value is perceived to be added by the business.

Training plans need to be reviewed regularly, especially with key sponsors, clients and ➤

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Linda's last book, Motivating People in Lean Organisations, was published in 1997 by Butterworth-Heinemann. Her next is entitled Aligning HR and Business Strategy, due for publication

end-users. Typically, the areas to review include those shown in *Table 1*.

How will we know when we've arrived?

In identifying success criteria and meaningful milestones, it follows that to ensure an optimum return on the time and other resources invested in development, those activities must be well targeted. As trainers we need to know when we are 'arriving' and the business needs to know whether training is making a difference. This means ensuring that development activities address real needs, that appropriate solutions are offered and that these make a positive difference.

Making a difference can be measured at a number of levels. Donald Kirkpatrick's[1] evaluation framework suggests four levels. These are outlined in *Table 2*. Point four in this table is perhaps the most critical from the business perspective. Increasingly, 'hard' measures of the impact of development activities are required. These are always notoriously difficult to distinguish from a host of other variables. Kirkpatrick suggests the following guidelines to implementation when trying to assess the impact of training on business results.

Trainers need to be both **responsive** to changing needs and **able to challenge** attitudes and assumptions from their 'whole organisation' perspective

- Use a control group, if possible.
- Allow enough time for results to be achieved.
- Measure both before and after training, if feasible.
- Repeat the measurement at appropriate times.
- Consider the cost of evaluation versus the potential benefits.
- Be satisfied with the evidence if absolute proof isn't possible to attain.

Areas to review for training plans

- The progress made in implementing the plan
- What is happening in the business now that was not foreseen when we developed this plan
- How well customers (internal and external) perceive the plans to be meeting their needs
- Whether our stakeholders' priorities changed
- Whether we need to modify our plans in the light of other issues that have arisen or whether the current plans sufficiently robust.

The links between the objectives of the individual, the development activity and the individual's performance need to be strong if level four evaluation is to be credible.

In one financial services organisation in the early 1990s, poor business results meant that there was a freeze on promotions. There was also a squeeze on management development and any spend needed to be justified. The HRD team, in partnership with some of the business heads, argued that the company would lose some of its 'star' employees unless some form of development was offered. The question was: where should limited investment be focused?

The HRD team had been engaged in the identification of leadership competencies and it was decided that these could be used as the basis of a development centre for an identified group of 'at risk' high flyers. The output of the centre was to be information that individuals could use to drive their personal development plans with their managers.

To ensure that these plans could be relevant, managers were involved before and after the event in identifying individual objectives and in providing on-the-job coaching. Managers clearly needed, and received, careful briefing about their roles.

Individuals and managers needed to discuss and agree, prior to the event, what the individuals' main development needs were relative to the competencies. Various tools were provided, including 360 degree feedback, to help them to prioritise objectives. They had to be quite specific about how addressing that need would help. So they had to answer questions such as the ones listed next.

- If you were to learn to deal better with that situation, what difference would that make to you, to other people and the business?
- How will you know that you are making progress on that objective?
- How will you deal differently with the situation?
- How will people respond differently to you?
- What difference will that make to you, to others and to the business?

Participants came with very clear objectives and measures of success in mind. They were therefore active partners with the HRD and management team who were delivering the activities to ensure that the centre met their needs.

Immediately following the centre, individuals met with their managers and agreed a practical action plan to build on the outputs of the centre. The participants were followed up over the next 18 months at three- and six-monthly intervals.

The results were impressive. In addition to the 'soft' targets of the centre, such as making people feel valued, boosting morale and so on, there were many examples of the impact on the bottom-line of improved performance as a result of taking part in the centre.

One participant was able to pinpoint how, by changing his own leadership style as a result of the feedback and coaching he had received, he had managed his own team more effectively (and the team agreed). Nothing else had changed – it was the same team, and the market conditions were just as tough. However, within a year of the centre, that team had outperformed all other comparable teams, producing millions of pounds worth of extra sales revenue.

Pressure to prove that development activities add value is usually at its worst when business results mean that every item of expenditure needs to be justified. However, carrying out evaluations on this scale can be time-consuming and costly, too, except that the costs are likely to be hidden. Indeed, an IPD survey[4] found that employers significantly underestimate how much they are spending on training and development. This is partly because salaries of trainers and trainees are usually excluded when costs are calculated, except in sectors such as local government where the former purchaser/provider accountability split still focuses minds on true costs.

The survey revealed that 25 per cent of organisations did not have training budgets and nearly 35 per cent have budgets that only cover the costs of external courses.

Marilyn McDougall and Angela Mulvie[5] carried out a study of how companies measure the impact of HRM to the bottom-line. They found that currently many organisations make access to management knowledge and skills available on a general basis to employees as part of a philosophy of continuous learning. Participants are therefore not expected to produce improved bottom-line results thanks to the training in the short-term, though the researchers predict that this situation might change.

The challenge, then, for the training function is to reach the point when the value of training speaks for itself, without the need for a heavy marketing effort. This is most likely to be achieved when trainers work in partnership with their clients and suppliers to identify needs, and design and deliver excellent solutions.

Trainers need to be influential, understand and act on business priorities, as well as being experts in their own field. Line managers can be supported in their performance management role through training, and should take an active role in providing coaching and other on-the-job follow-through from training. Line managers need to be able to use training as a strategic tool to achieve the organisation's objectives.

Developing, implementing and evaluating training strategies is a political process. Trainers need to be both responsive to changing needs and able to challenge attitudes and assumptions from their 'whole organisation' perspective. If implemented effectively, training strategies should be a key means of ensuring that the organisation can achieve competitive advantage through the skills and talents of its employees.

> As trainers we need to know when we are **'arriving'** and the business needs to know **whether training is making a difference**

Table 2
Kirkpatrick's evaluation framework: four levels for measuring the difference

Reaction:	what do participants think about the activity at the time?
Learning:	how have skills, knowledge or attitudes improved as a result of the activity?
Behaviour:	how does participants' changed behaviour affect their constituents – for example, their work group?
Results:	how do these improved behaviours, skills and knowledge translate into bottom-line impact?

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Immediately following the centre, individuals met with their managers and agreed a practical action plan to build on the outputs of the centre. The participants were followed up over the next 18 months at three- and six-monthly intervals.

The results were impressive. In addition to the 'soft' targets of the centre, such as making people feel valued, boosting morale and so on, there were many examples of the impact on the bottom-line of improved performance as a result of taking part in the centre.

One participant was able to pinpoint how, by changing his own leadership style as a result of the feedback and coaching he had received, he had managed his own team more effectively (and the team agreed). Nothing else had changed – it was the same team, and the market conditions were just as tough. However, within a year of the centre, that team had outperformed all other comparable teams, producing millions of pounds worth of extra sales revenue.

Pressure to prove that development activities add value is usually at its worst when business results mean that every item of expenditure needs to be justified. However, carrying out evaluations on this scale can be time-consuming and costly, too, except that the costs are likely to be hidden. Indeed, an IPD survey[1] found that employers significantly underestimate how much they are spending on training and development. This is partly because salaries of trainers and trainees are usually excluded when costs are calculated, except in sectors such as local government where the former purchaser/provider accountability split still focuses minds on true costs.

The survey revealed that 25 per cent of organisations did not have training budgets and nearly 35 per cent have budgets that only cover the costs of external courses.

Marilyn McDougall and Angela Mulvie carried out a study of how companies measure the impact of HRM to the bottom-line. They found that currently many organisations make access to management knowledge and skills available on a general basis to employees as part of a philosophy of continuous learning. Participants are therefore not expected to produce improved bottom-line results thanks to the training in the short-term, though the researchers predict that this situation might change.

The challenge, then, for the training function is to reach the point when the value of training speaks for itself, without the need for a heavy marketing effort. This is most likely to be achieved when trainers work in partnership with their clients and suppliers to identify needs, and design and deliver excellent solutions.

Trainers need to be influential, understand and act on business priorities, as well as being experts in their own field. Line managers can be supported in their performance management role through training, and should take an active role in providing coaching and other on-the-job follow-through from training. Line managers need to be able to use training as a strategic tool to achieve the organisation's objectives.

Table 2
Kirkpatrick's evaluation framework: four levels for measuring the difference

1.	**Reaction:** what do participants think about the activity at the time?
2.	**Learning:** how have skills, knowledge or attitudes improved as a result of the activity?
3.	**Behaviour:** how does participants' changed behaviour affect their constituents – for example, their work group?
4.	**Results:** how do these improved behaviours, skills and knowledge translate into bottom-line impact?

Developing, implementing and evaluating training strategies is a political process. Trainers need to be both responsive to changing needs and able to challenge attitudes and assumptions from their 'whole organisation' perspective. If implemented effectively, training strategies should be a key means of ensuring that the organisation can achieve competitive advantage through the skills and talents of its employees.

> As trainers we need to know when we are **'arriving'** and the business needs to know **whether training is making a difference**

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Parts one and two of this article were published, respectively, in the October and November issues of *Training Journal*.

Working with consultants

Before rushing into a contract relationship with an external training consultant, you should be absolutely clear as to what you want to achieve and exactly what you expect the consultant to provide. **Arthur Proud** guides you through the process.

Many client/consultant relationships end up with dissatisfaction on both sides. The buyer of the service – the client – feels they didn't get what they wanted and the consultant feels their services were wasted. It need not be like that but making a worthwhile and productive partnership between the client and the organisation can be tricky.

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Figure 1 shows the relationship between the three parties. Notice the dotted line between your client and the external consultant. This is to indicate that there is *no formal contractual relationship* between them. Of course they will meet and work together on aspects of the programme, but the contractual relationship is between you and the consultant.

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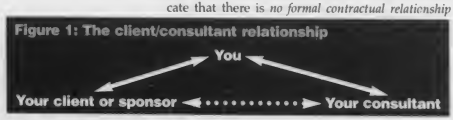

Central to the establishment of a trusting relationship between the three of you are two specifications: the Training Specification and the Consultant Specification. You draw up these documents after the initial meeting (or series of meetings if it is a large project) with your internal client.

The first meeting with your client: what's it all about?

Information about your client's needs is an essential precursor to any further work. Without it you are working in the dark and there is a risk that you end up imposing your ideas about what your client wants from the programme.

Probably the most essential piece of information you need to obtain is what your client expects the training programme to deliver. Quite often 'training' is used to cover inadequacies of everyday management or is a palliative for other pressing concerns – in reward structures, reporting procedures, shift and leave arrangements, out-of-date equipment and so on. One client of mine expressed the objective for the proposed training programme as 'Giving them an enjoyable time because of all the hard work they'd done'! I suggested theatre tickets as a cheaper alternative.

So, use this first meeting to identify what your client really wants and to agree that the proposed training programme is what they actually need.

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Once you've drawn up the specification you can start your hunt for the right person for the job just as you would for a permanent member of staff. (Finding a suitable consultant will have to be left for another article.)

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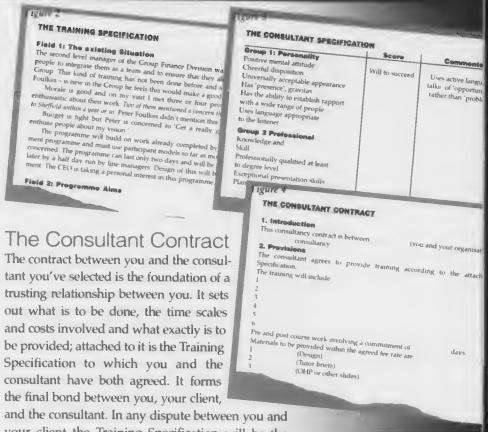
Figure 2
THE TRAINING SPECIFICATION
Field 1: The existing Situation
The second level manager of the Group Finance Division wa
people to integrate them as a team and to ensure that they al
Group. This kind of training has not been done before and w
Foulkes – as new in the Group he feels this would make a good
Morale is good and on my visit I met three or four peo
enthusiastic about their work. Two of them mentioned a concern th
to Sheffield within a year or so. Peter Foulkes didn't mention that
Budget is tight but Peter is concerned to 'Get a really g
enthuse people about my vision'
The programme will build on work already completed by
ment programme and must use participant models so far as m
concerned. The programme can last only two days and will be
later by a half day run by line managers. Design of this will b
ment. The CEO is taking a personal interest in this programme
Field 2: Programme Aims
Figure 3
THE CONSULTANT SPECIFICATION

Group 1: Personality	Score	Comments
Positive mental attitude		
Cheerful disposition	Will to succeed	
Universally acceptable appearance		Uses active langu
Has 'presence', gravitas		talks of 'opportun
Has the ability to establish rapport with a wide range of people		rather than 'probl
Uses language appropriate to the listener		

Group 2 Professional
Knowledge and
Skill
Professionally qualified at least to degree level
Exceptional presentation skills
Figure 4
THE CONSULTANT CONTRACT
1. Introduction
This consultancy contract is between
consultancy (you and your organisat
2. Provisions
The consultant agrees to provide training according to the attach
Specification.
The training will include
1
2
3
4
5
6
Pre and post course work involving a commitment of
Materials to be provided within the agreed fee rate are
1 (Design)
2 (Tutor briefs)
3 (OHP or other slides)
days.

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The contract between you and the consultant you've selected is the foundation of a trusting relationship between you. It sets out what is to be done, the time scales and costs involved and what exactly is to be provided; attached to it is the Training Specification to which you and the consultant have both agreed. It forms the final bond between you, your client, and the consultant. In any dispute between you and your client the Training Specification will be the arbiter and in any dispute with the consultant, the Consultant Contract will be the referee. See Figure 4 for a sample contact.

Once the contract has been signed, the stage is now set for work to begin; the setting looks like Figure 5.

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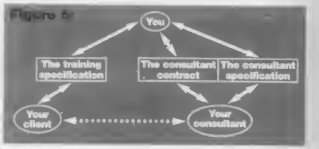

A final word

Designing the Training Specification will help to clarify the goals and objectives of the training programme. The Consultant Specification (and the resultant contract) formalises the relationship and sets out, in specific terms, what the consultant is expected and required to provide. It's tempting to pay only scant attention to this part of the training programme and to leave it to the consultant to sort everything out. If you do that you'll probably find yourself among the many people I've met who say that consultants are a waste of time and don't deliver what you want. Which, as any consultant will tell you, is not the case.

Arthur Proud runs the Balance Consulting Group of Sutton Courtenay, helping organisations in the UK and USA to develop their people as the most effective way to manage change. He is the author of the Internal Consultancy Manual and the External Consultancy Manual, both published by Fenman.
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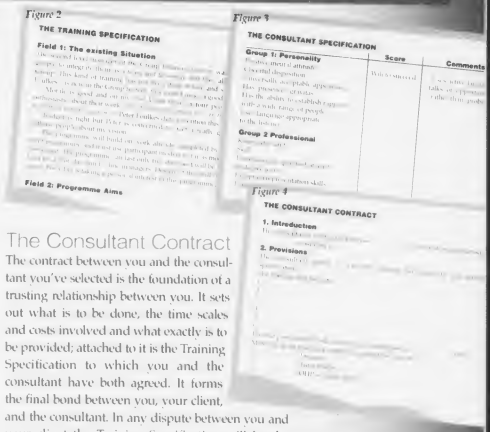
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Has the ability to establish rapport with a wide range of people		
Use language appropriate to the listener		

Group 2 Professional

Figure 4

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1. Introduction

2. Provisions

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Evaluating outsourced training

Robert Terry discusses the ways in which outsourcing relationships work, the types of agreement that may be reached and how, when paying another organisation to undertake training and development, you can evaluate its effectiveness and justify the expense.

The growth in the number of organisations outsourcing their training needs has placed greater emphasis on the need to evaluate training. Education, training and development, and the support of learning and knowledge creation, can be critically important for corporate development and competitiveness, and the consideration of outsourcing options can be a good time to reassess these areas and their priorities to ensure that they support the achievement of key corporate objectives.

Securing access to the additional, and hopefully, complementary capabilities of an outsourcing partner can sometimes provide the means of offering an enhanced and more vital range of service. But an outsourcing arrangement can represent a significant initial investment of money and time, and a considerable and continuing commitment thereafter.

Whatever the arrangements put in place, they need to be able to stand the test of time. Hence the importance of looking ahead – beyond immediate requirements – at needs and priorities that are likely to arise in the medium to longer term.

Outsourcing must be sufficiently flexible to cope with changes of priority, and the speed with which approaches to training, development and learning technology are evolving.

It should also be remembered that education, training and development are different in nature

from other areas, such as property services or the support of information technology, which an organisation may have outsourced. It is particularly important, therefore, that arrangements entered into for outsourcing these areas are sensitive to what is distinctive about an organisation and its strategic direction, corporate priorities, culture and values.

The nature of what is outsourced and the form of arrangements that are entered into should also reflect the degree of confidence that can be placed in one or more potential outsourcing partners and the number of separate arrangements that are entered into.

The experience of outsourcing in other sectors suggests that arrangements with a single partner are easier to manage than those involving a number of separate suppliers. When there is a degree of independence between different activities, major changes become difficult to implement when separate negotiations with a number of different suppliers are involved.

For this reason, it is important to be clear about what activities, capabilities and facilities are to be outsourced. Ideal candidates are those that are relatively self-contained. It is where a variety of different parties are involved, and boundaries, accountabilities and allocations of cost and time are uncertain, that confusion of responsibilities is most likely to occur. The most accountable arrangement is likely to involve discrete programmes and resources, transparent accounting and a single point of management contact with a sole supplier.

Critical and priority requirements

In the first instance, an organisation needs to be clear about why it is considering outsourcing as an option. The rationale should be made explicit to the potential supplier partner. The more open and precise an organisation is prepared to be, the more likely it is that proposed arrangements will address its critical and priority requirements.

On the other side, supplying companies should be able to provide consultancy support to an internal team, with responsibility for reviewing outsourcing options, and establishing an outsourcing process. In addition to the creation, delivery and management of corporate training programmes, the supplying company should also be able to facilitate a review of current arrangements, undertake cultural audits and surveys of attitudes to training and development, and advise on processes and practices for maintaining quality, relevance, assessment, monitoring and reporting. Outsourcing arrangements can then be built on successful practice, and allow comparison with what went before. Trend lines are important for monitoring whether or not standards are improving, and – if the training and development team has an agreed statement of quality principles, agreed teaching and learning strategy – an efficient project management process and system of account management can ensure accountability quality and relevance.

Consideration should also be given to some activities being subject to external and independent valuation, to ways in which student and staff feedback can be obtained, and to means by which progress can be monitored.

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Evaluation can then be performed over a period of time at four levels:

- the quality of the execution of the training
- the quantity and quality of learning
- the level of transfer of the training to the workplace, and
- the effect of the training on the business or specific area of the business.

How performance is to be assessed and the nature of its link with how the outsourcing partner is to be rewarded is always going to be a matter of central interest for the potential partners during negotiations.

In addition, it is characteristic of outsourcing that contracting parties accept higher levels of openness in the matter of reward for services. Open book accounting procedures are normal and help to create a climate of trust and genuine partnership. Typically, there is a great deal of interest in the size and nature of discounts offered in return for long-term or large-scale commitment; and, historically, negotiations between customer and potential supplier were efficiency focused and the objective was to achieve desired outcomes for the least cost. Strategic alliances or partnerships use more complex measure to monitor performance such as 'service level agreements' (*Training Journal*, August 1999) – which depend on measures that are both objective and acceptable to all parties – often ➤

Robert Terry is founder and group managing director of ASK Europe plc: a group specialising in training and development to improve individual and organisational performance. His areas of interest are the impact of new technologies, new processes and new structures on people in large organisations. He has made a particular study of the potentially damaging impact of acquisition or merger on workforce effectiveness.
He can be contacted at (tel) 01908 675050.

providing for bonus payments or penalties for exceeding or falling below agreed standards.

In single party contracts, rewards must reflect the economies of scale afforded, but they must equally recognise the additional responsibilities and other value-added services provided by the supplier. For example, they may include recognition of any infrastructure put in place exclusively for the purpose of servicing the contract.

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Objectives for outsourcing

In the desire to achieve an agreement, the purpose of training and development activities should never be overlooked. Training and development activities and resources should add value rather than be regarded merely as a cost. An outsourcing review can be undertaken, and arrangements concluded with the specific purpose of increasing distinctive contribution. This can occur at a number of levels. For example, people who are more competent, motivated and fulfilled are also more productive, while the creation of new knowledge can become a source of differentiation and intellectual capital.

Overall, outsourcing arrangements must be viewed as strategic relationships which, if they are to endure, must be perceived as fair by all the parties involved, provide clarity and ensure accountability.

One of the consequences of an effective outsourcing partnership is that senior management is freed from the distractions of those day-to-day operational issues which become the responsibility of the partner organisation. Management is therefore able to concentrate more on the definition of new requirements, monitoring relevance and quality, raising the profile of training and development, and enhancing strategic contribution.

In all this, however, there is a need to recognise that all or any training and development activities – whether outsourced or not – are not an end in themselves. They are a means for achieving improved organisational performance and thus driving up shareholder value. They should not be pursued merely for their own sakes.

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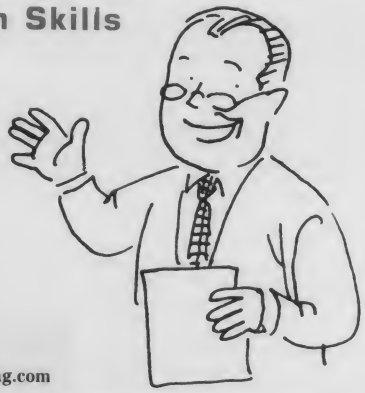

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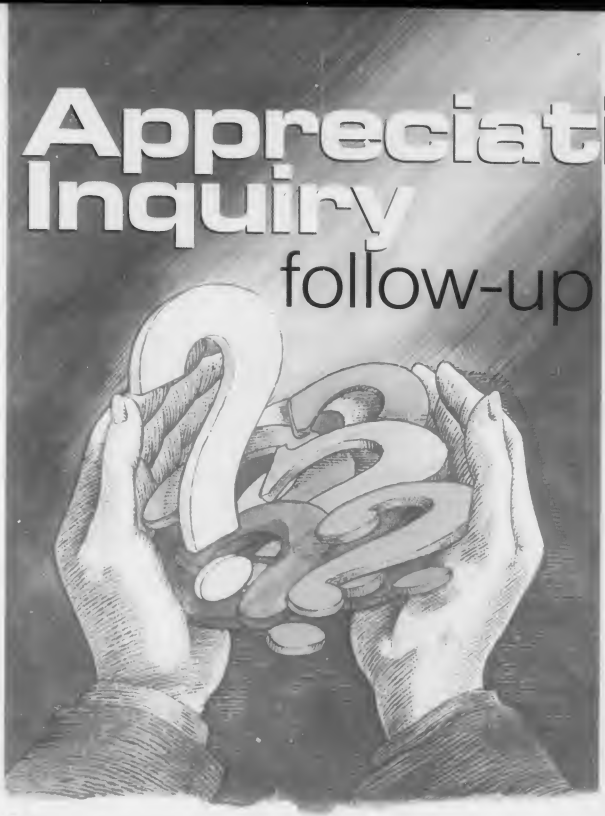
Appreciative Inquiry follow-up



Because of the strong and positive response to the cover story on Appreciative Inquiry (*Training Journal*, November 1999) we have asked Liz Mellish to do a special interview with David L. Cooperrider from the Weatherhead school of management at Case Western Reserve University. Cooperrider and his colleagues published the original work on Appreciative Inquiry (AI) in 1987.[1] It is our understanding that since then literally hundreds of people have been involved in creating new practices for AI, and for bringing the spirit and methodology of AI to organisations all over the world. The velocity and largely informal spread of the ideas, suggests a growing sense of disenchantment with exhaustive, and more traditional, approaches to change, especially those wedded to what Cooperrider calls 'deficit-based theory'.

David Cooperrider has agreed to tell the full story of Appreciative Inquiry and speak about some of his award-winning work in multinational companies and, most recently, his involvement with His Holiness the Dalai Lama and religious leaders from around the world. We look forward to bringing this interview to you.

The Editor

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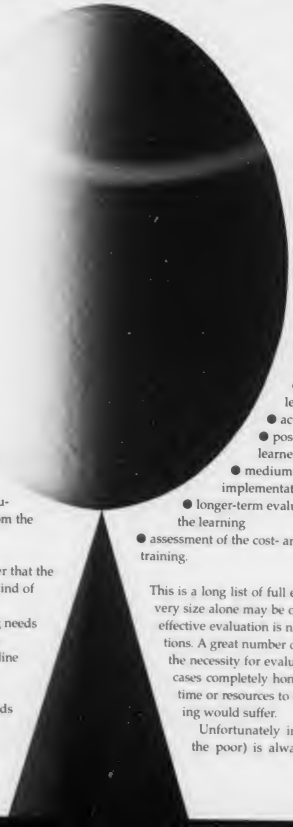
A 'radical' approach to evaluation

Leslie Rae invites us to consider the effective use of the evaluation of training by becoming familiar with his 'evaluation quintet', then taking a 'radical' approach to the situation.



Anyone who has read either (or both) of my books on evaluation (see References) or my other scribblings over the past 15 years will have gathered that one of my obsessions in training and development is to encourage the greater and more effective use of the evaluation of training. My approach has involved two major aspects. The first is that evaluation is a very extensive subject following on from the identification of training needs to:

- the acceptance by the line manager and learner that the needs should be met and by the use of what kind of training vehicle
- arrangements for the meeting of those training needs
- assessment before training of the learning gap
- pre-programme briefing of the learner by the line manager
- assessment as necessary at the start of the training to confirm these specific training needs
- interim validation of the learning and the training
- end-of-course/programme assessment of the validity and extent of the training and the learning
- action planning by the learners
- post-programme debriefing of the learner by the line manager
- medium-term evaluation of the implementation of the learning
- longer-term evaluation of the implementation of the learning
- assessment of the cost- and value-effectiveness of the training.

This is a long list of full evaluation requirements and the very size alone may be one of the principal reasons why effective evaluation is not attempted by many organisations. A great number of trainers who, in theory, accept the necessity for evaluation state simp' nd in many cases completely honestly, that they do not have the time or resources to do it, otherwise the actual training would suffer.

Unfortunately in this respect, evaluation (like the poor) is always with us, and the trite and

hackneyed statement that 'if you don't know where the learners have come from and you do not assess the changes, how will you ever know whether/what they have learned?' is true.

The second relevant aspect concerns who is/should be involved in the evaluation process and some years ago I 'invented' the 'training quintet' of people who should be involved in the training process. This 'quintet' can also be called the 'evaluation quintet' as they are the same people. This quintet is demonstrated graphically in Figure 1.

Each member of the quintet has responsibilities in the evaluation cycle and, if the evaluation is to be complete and effective, each must discharge their responsibilities.

This is where the major problem lies. The quintet members, such as senior and line managers who can and should play a major part, in many cases fail (or even refuse) to do so at best and, at worst, don't even think about their roles.

Arguments against taking part abound. 'It's the trainer's job to look after training evaluation'; 'I have an operational management job to do'; 'Surely all this isn't necessary; just ask the trainees how they got on' and so on.

In such cases trainers are expected to fulfil all the responsibilities themselves and, as stated earlier, if trainers are fully obligated to producing training programmes of whatever nature, they have little time left to perform the evaluation activities that others should be discharging. (See Figure 1.)

As a result, and particularly if senior management is not demanding evaluation and resourcing for that purpose, the trainers (and who can blame them) say: 'Why should I bother; nobody else seems to do so.' This is the extreme, although not unusual, case and there are many levels of insufficient evaluation due to lack of responsibility discharge or support for any of the members of the quintet by the others.

Let us take a scenario where the trainer is committed to evaluation, but, apart from the training manager and the learners, is alone in this commitment. There are three basic options.

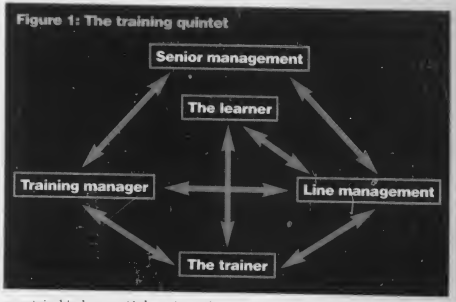
- Option 1: do nothing.
- Option 2: do everything.
- Option 3: do something.

Option 1

As far as the trainers are concerned, if nothing is done they are leaving themselves wide open to accusations of training for training's sake, offering expensive, ineffective training, and why haven't they evaluated it?!

In many cases, however, where the culture is of a certain kind, even if they do nothing, nobody will ever challenge them. But neither will they ever be able to challenge anyone over budgets, time, resources and so on, as they have no evidence to support any argument. And trainers, being what they are, will feel most unhappy at the situation.

Figure 1: The training quintet



Option 2

Without the support, encouragement and resources from elsewhere – senior and line management – the option at the opposite end of the spectrum is for trainers to attempt the full evaluation approach themselves.

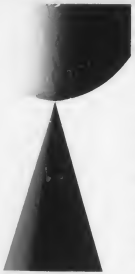
Few trainers will have sufficient time to devote to this action, so in most cases the attempts are either abortive or ineffective, unless the trainer is able to do something about time, resources, budgets and so on. But even then there are areas of the cycle that the trainer is most unlikely to be able to service – for example, TNA in the workplace, post-programme evaluation, and cost- and value-effectiveness. The best that one can say about this approach is that, with the best will in the world, the trainers are showing that they are committed to producing effective training and want to obtain evidence to demonstrate this (even if this be only to themselves!).

Option 3

This is the most realistic option and, in fact, is the one to which all evaluation activities should be aimed. It is not really radical as it is part of the full evaluation cycle, but the radical approach is the two-pronged attack.

To begin with, trainers must accept that a) they cannot do it all themselves, b) they are not the ➤

Leslie Rae



best people to perform certain parts of the evaluation cycle, and c) they must in some way educate the others in the training quintet to discharge their proper responsibilities.

So the effective evaluator-trainers must restrict themselves to the parts of the cycle for which they have a direct responsibility. Apart from some areas that have a lesser importance, this means assessing the validity of the training as the programme progresses by means of ongoing tests, direct or indirect, and other forms of interim validation. Then, at the end of the programme, there must be a gathering of the success of the programme from the point of view of the objectives of both the trainer and the learner, and the first steps in processing the implementation of the learning.

Forget reactionnaires that pat the trainer on the back (the 'happy' sheet) and complicated questionnaires that produce masses of interesting, but useless scores – useless apart from trying to impress others with a 'mathematical' assessment. Learning is about change and training is about giving the learners the opportunity to promote that change.

So at the end of the programme, ensuring that there is sufficient time for full reflection and completion, a five-point questionnaire, such as the one shown in Table 1, should be completed by the learners.

When analysed, the answers to these questions will demonstrate, by the extent and type of learning described, whether the training achieved its main objectives; what personal learning the learners have achieved and whether they achieved their objectives; and first indications of their intentions of implementation of the learning.

This questionnaire is then followed up, again by ensuring that there is sufficient time built into the programme to allow for reflection and completion, by encouraging the learners to produce a realistic action plan that they will operate on return to work.

After the training/learning, perhaps the most important part of the training cycle is the implementation of the learning back at work. This will demonstrate the reality of the training/learning and its impact on the learner, and it will enable change to take place in the real-life situation, supported by the learner's manager and peers. It is unusual for the trainer to have the time/resource to assess this implementation, which is a powerful confirmation and evaluation of the training and learning and, after all, it is the learner's line manager who has not only the responsibility for these actions, but also the role of determining whether the expenditure on the training has been effective.

Table 1: End of course/programme evaluation questionnaire:

- What have you learned?
- What do you intend to do with that learning?
- What have you been usefully reminded of (in cases where you had previously known or learned that element)?
- What are you going to do with that reminder learning?
- Any other comments?

So the line manager must follow through an evaluation programme of post-programme debriefing, discussion of the action plan, support for the learner and the action plan, medium-term evaluation of the implementation extent and achievement, and a similar longer-term assessment and evaluation. These are the responsibilities of the line manager who, by any means available, must be 'encouraged' to discharge them.

Encouraging the line manager is not an easy task and this objective is a responsibility fairly and squarely on the shoulders of the trainers who, if it is not being done, must take on a strong educative role with the line manager – what evaluation is and why; what their roles are and why they are the best people to perform certain tasks; what benefits will accrue for them and the learner; and how to go about the various activities. Not an easy task, but an essential one, eased to a large extent if there is very active support by the senior managers and the training manager.

With the fulfilment of the educational programme, trainers can then concentrate on a) the training contribution and b) their own responsibilities as part of the evaluation quintet in the evaluation cycle. Can any of those in the quintet afford not to take on their responsibilities and so reduce the chance of the evaluation not succeeding?

Editor's note: *Full details of the complete evaluation cycle plus relevant activities and instruments are contained in the two books mentioned in the Reference section. Internet discussion on this subject and the 'radical' suggestion has taken place in recent months through the UK-HRD online discussion forum (managed by* **Training Journal***) and similarly over a wider, international scene through the US-based 'TRDEV-L' forum. In the latter case, contributions came from trainers and training managers in countries as far apart as Indonesia, Switzerland, India, Australia, England, Scotland, Canada and the USA. These comments demonstrate the eagerness of trainers to have the existence of an effective evaluation system, and also the recognition of the difficulties a) for themselves, and b) in the essential educative process.*

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Rae, L, *How to Measure Training Effectiveness* (3rd edition), Gower (1997).

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Perspectives on organi

Many of us spend much of our lives working within organisations. What do they represent for us and are they meeting our deepest needs? **Glynis Judge** helps us to look at organisational culture through the metaphor of community and drama.

The objective of this article is to encourage the reader to reflect on our origins and the way we lived our lives in tribes and later in communities, and to compare these beginnings against our current lives within organisations. This approach might give us the opportunity to learn from the positive aspects of the past that created richness in people's lives, and enable us to develop workplace cultures where people can be more effective and thus more productive.

All of us create the worlds we live in. Through our projections onto our day-to-day habitats we create a reflection of how we see the world. Is the glass half empty or is it half full? Is the stranger we see in the street potentially a friend or foe. If we stand as a witness to our own organisation and describe it, our description may be quite different from that of a colleague. Our inner world is populated with dreams, ideas, expectations that are at least as instrumental in determining how we experience our lives as are the events we encounter in the physical world.

If we imagine organisational life as a drama being enacted on a day-to-day basis, we can assume that people will take up certain roles within that drama. If the organisation does not have a plot, a storyline known to all, then the drama is portrayed differently by each individual. Each will cast themselves by taking a part they feel is essential to enactment. This will create fragmentation, splitting of energy and loss of productivity.

How might organisations ensure the drama is worthy of being part of? Perhaps examining organisations through the metaphor of community might allow us to gain an insight.

The history of 'community'

What is a community? Definitions in the *Concise Oxford Dictionary* include: 'all the people living in a specific locality', 'a body of people having a religion or profession in common' and 'fellowship of interests'. Malidoma Patrice Some says: 'A true

isational life

community begins in the hearts of the people involved. It is not a place of distraction but a place of being. It is not a place where you reform but a place to go home to. Finding a home is what people in community try and accomplish." From these definitions it would be a logical assumption to expect that:

- people would know each other
- people would know the background and family of that person
- people would feel part of something – a common purpose, shared meaning and some quality of interdependence would be observed in the way people went about their daily lives
- there would be some giving and receiving of mutual support.

If we look at the history of community, we see its roots in tribes, which is how people lived for protection and survival. There was a dependency on one another.

The tribe lived together, a distinctive culture created from its beliefs, values, religion and history (passed down through story-tellers). It had structure, rituals, key figures, and respect for elders and their wisdom. External influences would challenge these tribes, but finally the western world broke through and destroyed their culture.

> Currently, our society encourages the cult of **individual satisfaction** to the detriment of a community-based approach

Our current organisations have developed from structures such as the Church and, to a lesser extent, the military. These were structures that acknowledged power and hierarchy, and which enabled organisations to manage and control the people engaged in working for them. ➤

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It could be argued that many organisations have not consciously modelled themselves on community structures that are deeply rooted in tribes but are aware of the existence of a hole or gap. Organisations have tried to 'fill the gap' by placing emphasis on developing cultures that empower individuals, create teamwork, motivate people to grow and develop – thus creating organisations where people work collaboratively.

Are we trying to create workplaces where there is unity, trust, openness, caring, respect for elders and respect for the environment? Are we clear about why we are endeavouring to create this type of culture? Can we take some wisdom from communities and how they were organised? Does community manifest itself within *your* organisation and is that what people need as we move into the 21st century?

Today's organisations

Our organisations have become places where production and profit are the overt, spoken outcomes. We tend to downplay and sometimes even ignore celebration around personal achievement, human endeavour and demonstration of the human spirit. Organisations, in my view, reflect societies' attitudes at any point in time. Currently, our society encourages the cult of individual satisfaction to the detriment of a community-based approach. However, some of the deepest needs people have are to belong, to feel that what they do matters and to be treated as human beings.

> For a play to be successful people must understand the whole plot and know how they contribute to the story

At a recent senior management meeting, the guest speaker was asked: 'Do you think we'll still be having meetings like this in the future?' The answer was a definite: 'Yes, because we are fundamentally pack animals.' This sense of belonging is very deeply rooted in our psyches.

Community within organisations

I have been fortunate to have experienced two organisations recently that have a sense of community. The first is a Christian-based charity, whose vision statement is a key part of everyone's philosophy. Likewise, the six key values – which include personal integrity and personal dignity – are lived out both in the service they provided and the way they live and work together. My experience of working with them was both humbling and enriching. I encountered a community spirit where each person was committed to their work because the work they were doing totally mirrored their own purpose. There was true alignment.

The second example is a thriving technology company consisting of more than 200 people. It started as a small group of researchers who had shared values of creativity, fun and learning, and who worked as a small community. This feeling of community was acknowledged and nurtured as the organisation grew.

Recently, the organisation floated on the Stock Exchange and its values began to change to meet the needs of both clients and shareholders. The change was imperceptible at the beginning but slowly the gap between the values and purpose of individuals began to disengage from the purpose and values of the organisation. This organisation had become mis-aligned and this was regarded, particularly among the more established employees, as a feeling of not being known as individuals and a sense of uncertainty of the future. The staff began to feel that they did not belong.

The organisation is now revisiting its purpose, values and philosophy in order to sustain the sense of community because it feels it is worthwhile enough not to be lost.

Learning lessons

The technology company developed organically. The Christian organisation was founded on a belief system that employees already held within them. Many organisations have to develop their own philosophy, belief system and value set. However, this often falls short of really connecting people at a deep level. Why? Perhaps it's because many people do not feel it is 'safe' to declare their more traditional, primitive needs that relate to their soul and spirit.

Often we lock ourselves under an image of 'I can cope' and 'I'm OK'. How can we begin to develop a culture where people work in a 'place of being' a 'place to go home to' as described by Malidoma Patrice Some?

One starting place is to give sufficient thought to the organisation as a whole – this being the drama, the stage it creates for the play to be lived out – and the infrastructure that contains and directs it – meaning the roles, the traditions and the rituals. Without this framework people will try to create some order but it will not represent collective thought. We need, therefore, to consider how we might weave some cohe[illegible] pattern to unite the organisation.

Uniting an organisation

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Uniting an organisation

The first task that needs to be undertaken is to determine the organisation's purpose – not

through what it sells or which service it provides but by answering the question: 'What is its contribution to the wider community?'

The purpose should never change; it is the sacred core of the organisation and says why it exists. This starts to create roots. Walt Disney's core purpose is 'To make people happy'. 3M's core purpose is 'To solve unsolved problems innovatively'. Wal-Mart's core purpose is 'To give ordinary folk the chance to buy the same things as rich people'. How do you get to purpose? Collins and Porras[2] suggest the 'Five whys'; you start with the descriptive statement: 'We make "x" products', then ask 'Why is that important?' five times. After a few 'whys' the purpose becomes revealed.

Forming the vision

We already know how important vision, mission statements, beliefs and values are, but do we really live these out on a day-to-day basis? Often, the statements are handed down through the organisation and become plaques on a wall in the reception area – and often, they do not mean anything to employees.

Forming visions, values and so on are key pieces of work to be undertaken with commitment. Returning to the Christian charity, it recently ran a one-day workshop for all staff to attend in small groups to discuss the values, how they are being lived out and what they really mean to people – both the employees and the residents they support. This has taken up valuable resources in terms of time and money, but the charity knows it cannot sustain itself unless these values are internalised by all staff.

Staging and casting

Turning our attention to the stage created for the play to be lived out, how is *your* organisation structured? It might be useful to look at whether the structure separates rather than unites work groups and teams. A structure whose image is one of a hub and spokes is more likely to create unity than the traditional hierarchical, functional design. How are offices designed? Are people able to find a place for discussion? Are they able to meet at a 'watering hole'? Is there a place for them to relax, switch off from work to refresh their minds?

Once the stage has been designed for the play, how are the roles cast? For a play to be successful people must understand the whole plot and know how they contribute to the story. Are you casting roles successfully through professional recruitment policies? And are the jobs designed to ensure that each person understands the value they are adding and how they relate to the rest of the cast?

Traditions and rituals

With regards traditions and rituals, these create a feeling of belonging. They can also create a sense of pride and self-esteem. Often, when I visit organisations people love to tell me about traditions such as their breakfast meetings during which the head of department updates and discusses the latest issues, or the annual away-day where people are invited to stay overnight with their spouses.

What traditions does your organisation have and what rituals does it carry out for induction, for promotion, and for internal transfer? How does it mark beginnings and endings? How does it mark

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achievement of the individual and the team? How does it remember special events in people's lives? How does it acknowledge wisdom? Who or what carries or records the wisdom of the organisation, and is that acknowledged for its potential use in future decisions and plans?

So often in organisations the emphasis is placed on training and development of the individual and teams to develop new skills and to support a change in their behaviour. Less emphasis is placed on developing a sense of place where people feel they truly belong.

Organisations need to ensure that everyone is clear about purpose both for the organisation and for themselves. The infrastructure needs to be designed in a way that enables communication in its natural form as well as the more structured meetings. There is a need for rituals and ceremonies to mark special occasions not only for the organisation but also for its individuals.

Paying attention to some of the above ideas to transform culture may begin to move organisations through the phase of individuality towards a new spirit of connectedness with its origins in community. I believe this is where we need to focus our attention as we move rapidly into the 21st century.

The author would be very pleased to hear from people who wish to develop cultures that build on some of the ideas discussed in this article.

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Coaching for excellent performance

In helping us to understand how to coach for maximum results, **Graham Guest** takes us through mental models, learning and change, coaching and the coaching relationship.

Many businesses proclaim that their people are their greatest asset. This is an attractive idea, particularly to the assets themselves. Some of the businesses making this statement actually believe it. Of those that believe it, some will try to put the philosophy into practice.

This might seem like a cynical opening to an article, but it is true that if we observe businesses closely we see that manipulation and control are still the favoured tools of management. Kofman and Senge[1] ask: 'Why do we confront learning opportunities with fear rather than wonder? ... Why do we create controlling bureaucracies when we attempt to form visionary enterprises?' They suggest that the main dysfunctions in our institutions – fragmentation, competition and reactiveness – are actually by-products of our success over thousands of years in conquering the physical world and in developing our scientific, industrial culture.

What, from a modern-day business perspective, are seen as dysfunctions, once served humankind well in the battle for survival and in trying to understand the workings of the universe. To find out how something worked it was necessary to break it down into its component parts. It was then understood as being no more than the sum of those parts. It was not only inanimate objects that were understood as mechanisms, but also organisations and the human beings they comprise. If something is wrong with a mechanism we try to find the part responsible and either fix or replace it. This procedure works well for most objects, but can be disastrous when applied to organisations and people. Managing an organisation has traditionally been a mechanistic operation. When part of the organisation malfunctions the manager attempts to put it right by some form of localised intervention, only to discover something going wrong somewhere else.

Consider the carpet-laying metaphor. When we amateurs try to lay a carpet we find that a bump mysteriously appears in one part of it. Being amateurs, we put our foot on the bump and it disappears. We think we have cured the problem, but when we turn around another bump has appeared as mysteriously as the first one. Indeed, it is the same bump manifesting itself in a different way.

We need to adopt an approach to solving the problem that is holistic rather than mechanistic – an approach involving the whole carpet!

Mental models

Mental models of reality help us to make sense of the world. A simple example of a model is a map of a city's metro system. The chaotic arrangement of tracks, stations and interchanges existing in reality is represented on the map by an orderly pattern of coloured lines, small spikes and circles. It is perhaps unlikely that anyone would assume the tracks to be prettily coloured in reality, but people might well assume that the actual layout of the tracks is accurately mirrored by the map. In any case, it is the model that we carry in our mind. How we imagine the metro system does

not have a great effect on our own life or that of our friends and colleagues.

But we also carry more important models, such as how people think or act, or of how organisations are structured and operate. From these models we can draw generalisations, such as 'all the people I work with are dishonest' or 'my organisation doesn't trust anyone to act on their own initiative'. Senge[2] says that the problems with mental models lie not in whether they are right or wrong – by definition all models are simplifications. The problems arise when the models are tacit – when they exist below the level of awareness. Some of our models, including those of people and their roles, can be deeply ingrained. Here is an example.

A boy is brought into a hospital, having been in a car crash. He has serious injuries and a surgeon is called to examine him. The surgeon arrives, looks at the boy and says: 'There is an ethical reason why I can't operate on this patient. He is my son.' But the surgeon is not the boy's father, so what is their relationship?

The answer is near the end of this article and it is surprising how many people end up kicking themselves for not seeing the 'obvious'.

Learning and change

When we are faced with a problem, such as the bumpy carpet, we can take some sort of action to resolve it. If we solve the problem by our action we have had a learning experience such that if the problem occurs again we can draw on our learning and apply the same solution. But what if the problem, when it occurs a second time, is not solvable by the same action?

Generally we will look for another way to solve it. However, when problems occur in complex systems it is not always easy to detect causal connections and we might go on applying one solution because our mental model of the situation tells us that that is the correct solution.

Argyris[1] labelled the ability to assess the environment and make changes as single-loop learning. The ability to look at the mental models we hold about the environment and our resulting behaviour he called 'double-loop learning'. The inability to recognise that we apprehend organisational situations as mental models with the associated inability to apply double-loop learning to these situations means that organisations become rigid and resistant to change.

Coaching

I have commented on managing organisations, but what about managing people? Murphy[4] maintains that 'managing' people is a guarantee that one will never create a learning organisation. He says that, even now, most managers don't yet understand how manipulative most human resource approaches are and how such approaches invisibly undermine their very purpose: excellent performance. He calls for a change from managing people to coaching them and refers to what he calls generative coaching, based on the work of James Flaherty.

> Generative coaching is a way of **understanding people in their wholeness**, followed by conversations and actions consistent with that understanding

Generative coaching is a way of understanding people in their wholeness, followed by conversations and actions consistent with that understanding. Such a process requires of both the coach and the client a continual reassessment of their mental models. They need to recognise that all models are 'wrong' by definition and accept that they are participating in a mutual learning process. The essence of coaching – and to my mind all coaching is generative coaching – requires the coach to undertake the following.

- Discover how the client interprets, or makes sense of, the world. What do the client's mental models look like?
- Help the client to see the structure of the mental models they are employing and, indeed, recognise that they are models and not reality.
- Assist the client to detach themselves from the models for long enough to see that there are possibilities for new choices.

In short, it is the job of the coach to help the client to see new possibilities and provide a space in which the client can consider making different decisions based on a wider range of possibilities. By accompanying the client to a new 'meta-position' the coach participates in the client's double-loop learning process. Coaching is not about teaching, supervising or instructing. It is primarily about listening and establishing a relationship based on mutual trust, respect, commitment and confidentiality. Flaherty[5] himself presents coaching as a way of working with people that leaves them more competent and more fulfilled, so that they are more able to contribute to their organisations and find ➤

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or [illegible]

meaning in what they are doing. He describes the products of coaching as:

- long-term excellent performance
- self-correction
- self-generation.

'Long-term excellent performance' means that the client meets the high objective standards of the discipline in which coaching is occurring. Well-coached clients can observe how they are performing and are able to make adjustments to their performance without the coach's intervention. This 'self-correction' on the part of client helps the coach to avoid the temptation of feeling that they are indispensable. As human beings we can always improve. Well-coached people are aware of this and, through a process of 'self-generation', will find ways of doing so on their own.

Coaching and mentoring are often treated as synonymous or are seen to overlap; it is helpful, though, to distinguish between them

Coaching and mentoring are often treated as synonymous or are seen to overlap. It is helpful, though, to distinguish between them. Mentors have usually followed a path similar to that along which the mentee is travelling and can therefore help to define and work through personal and professional issues. Mentoring generally involves a long-term relationship. Coaches, as I have tried to show, play a more proactive role in orientating a person to the realities of the organisation, helping them to remove barriers to optimum performance while maintaining personal and professional integrity.

Following Murphy again, we might summarise the coaching relationship and the role of the coach as shown in *Table 1*.

Table 1
The coaching relationship and the role of the coach

The coaching relationship:
- creates mutual commitment, trust and respect
- encourages freedom of expression
- is congruent, giving and getting truthful feedback
- recognises differences between coach and client
- is personal/professional and private/confidential
- is harmonious, with communication and learning.

The Coach:
- devises positive challenges
- is primarily interested in the development of the individual
- is non-judgmental
- models clarity and honesty, showing the way to act
- values personality and diversity
- is able to confront breakdowns in communication
- uses techniques, including the questioning style, modelling, being coached, counselling, being mentored, training, being observed and observing others, giving and receiving feedback, demonstrating, being interviewed and interviewing, whichever is appropriate.

Finally

You might be surprised to learn that in the story earlier, the surgeon was the boy's mother. Don't be too hard on yourself if you didn't get it. Even though Dr Watson learned much from the coaching of Sherlock Holmes, he still couldn't discover all the possible mental models for a given situation, as the following story, which you won't find in the works of Arthur Conan Doyle, shows!

Sherlock Holmes and Dr Watson went on a camping trip together. After a good dinner they lay down and fell asleep. Some hours later Holmes awoke and nudged his friend, Watson.

'Watson,' he said. 'Look up and tell me what you see.

'I see a lot of stars in the sky,' replied Watson.

'And what does that tell you?' asked Holmes.

'Well, astronomically, it tells me that there are millions of galaxies in the universe. Astrologically, I observe that Saturn is in Leo. Horologically, I deduce that the time is a quarter past three. Theologically, I can see that God is all powerful and we are insignificant. Meteorologically, I believe we will have a fine day tomorrow. And what does it tell you, Holmes?'

It tells me, Watson, that someone has stolen our tent!

References

1. Kofman, F and Senge, PM 'Communities of commitment: the heart of learning organisations' in Chawla, S and Renesch, J (eds), *Learning Organisations: Developing Cultures for Tomorrow's Workplace*, Portland, Oregon: Productivity Press (1995).
2. Senge, PM, The Fifth Discipline: *The Art and Practice of the Learning Organisation*, London: Century Business (1990).
3. Argyris, C, *Personality and Organisation*, New York: Harper (1957).
4. Murphy, K, 'Generative coaching: a surprising learning odyssey', in Chawla, S and Renesch, J (eds), *Learning Organisations: Developing Cultures for Tomorrow's Workplace*, Portland, Oregon: Productivity Press (1995).
5. Flaherty, J, *Coaching: Evoking Excellence in Others*, Boston: Butterworth-Heinemann (1999).

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Follow-ing Murphy again, we might summarise the coaching relationship and the role of the coach as shown in *Table 1*.

Table 1:
The coaching relationship and the role of the coach

The coaching relationship:
- involves mutual commitment, trust and respect
- encourages freedom of expression
- is pragmatic in employing useful models
- recognises differences between coach and client
- is process-orientated and avoids 'techniques'
- is reciprocal, with both coach and client learning.

The coach:
- designs coaching conversations
- effectively assesses the client's structure of interpretation
- is non-judgemental
- speaks openly and honestly, allowing the client to act
- listens positively and actively
- is able to resolve breakdowns in communication
- acts with rigour, upholding the standards of the discipline being coached: creativity, being inventive; flexibility, being experimental while staying tuned to the client; consistency, upholding standards; patience, persisting and waiting without complaint.

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5. Flaherty, J, *Coaching: Evoking Excellence in Others*, Boston: Butterworth-Heinemann (1999).

To the class of '99

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In his own personal *desiderata* (or latter-day equivalent courtesy of Baz Luhrmann) **Garry Platt** lists 27 serious and not-so-serious truths for trainers and developers as they enter the Y2K zone.

To the new trainers and developers of the year 2000 there are some immutable truths with which you should be acquainted. These truths are derived from my own experience which, of course, is not universal and leaves much to be desired. But they are nevertheless a reflection of what I think and believe.

The serious

1. Preparation is the one universal truth; the more you prepare the better you will be. Preparation in the development of human beings is never wasted.
2. Never forget to thank your learners for their effort and participation. They have allowed you to share their journey. The destination is not always clear but it is always exciting.
3. Laughter is a strong learning aid, except when it's at a participant's expense.
4. Be humble when someone learns a new skill or competence. No matter what *you* did it was, after all, *their* achievement.
5. Be tolerant of learners' mistakes; errors and faults have a purpose, they help people to learn.
6. Be intolerant of your own mistakes as a developer; they can stop people learning.
7. Recognise that training not based on an identification of need is a hobby rather than a job.
8. Try to do something new on every programme you run.
9. When you ask for feedback on your performance as a developer, mean it and listen.
10. Despite checking, rechecking and treble checking there will always be one spelling mistake in your view foils, handouts or visual aids. Resign yourself to this but don't use it as an excuse for not checking.
11. All candidates on all programmes will always tell you that 'it is their line managers who should be on this course', and they're probably right.

The not so serious

12. Be resigned to the fact that every whiteboard you use in every hotel or conference centre will have been written on with indelible ink; the topic is usually some aspect of Maslow's hierarchy of needs.
13. The flipchart stand you will be given will always have a complete pad of paper. Unfortunately these will have had every square inch (both sides) covered in tight algebraic equations explaining statistical process control and, inevitably, Maslow's hierarchy of needs.
14. Two different remote control units will be required to operate the VCR and TV. One of these will be missing or broken; the other will be more complicated than the deck of the Space Shuttle. Learn to live with your inadequacies.
15. One member of every group you train will have seen it, heard it, done it all before, and none of it will have worked then, now or at any time in the future, particularly if the topic is Maslow's hierarchy of needs.
16. Asking a colleague if there is anything you should know about the group you are about to train is like asking if there is life after death. I guarantee you will find out the answers but in both cases it will be too late to do anything with the information.
17. You turn round and realise you have put the view foil of Maslow's hierarchy of needs upside down on the overhead projector. Trying to cover this error by taking off your clothes and thus distracting your audience just *will not work*. Own up to the mistake.
18. Never turn your back on a course participant who carries a machete or cattle prod. These people often cause problems.
19. Never work with colleagues who wear karate suits to run Microsoft Excel courses. This is a clear sign of trouble ahead.
20. Beating senseless a course participant in view or earshot of their colleagues can cause your learners to become distracted.
21. Not everyone is as clever as you are. For instance, half the people you train will have poor numerical skills, the other half will be average and the third half will be excellent. Be tolerant of those who do not reach your standards.
22. Never tell course participants you are unhappy. Half of them don't care and the other half will be glad.
23. The fact that someone disagrees with your views during a training session is no reason to challenge them to an arm-wrestling match, except of course if you are 200 lb heavier, in which case go for it.
24. There is never a good time to tell participants on a course that the water cooler in the room has been tested positive for the anthrax virus – unless it's just before your session on Maslow's hierarchy of needs, in which case it will come as a merciful release.
25. If someone complains of suffering from cognitive dissonance and emotional cathartic turmoil during your session on double- entry book-keeping, offering to let them sniff your marker pens will not help. On the other hand you personally may find it useful.
26. For God's sake spice up that session on Maslow's hierarchy of needs. Show some humanity.
27. Take all the above with a pinch of salt, except for the first one concerning preparation. Believe me, that one's true.

There is never a good time to tell participants the water cooler has been tested positive for the anthrax virus – unless it's before your session on **Maslow's hierarchy of needs**

Netcheck

Clare Forrest hands this month's 'bookmark it now!' award to a site from **Gower**, which offers simple and easy-to-use access to its range of ready-to-use resources.

It's getting harder and harder to find sites that have a genuine value for trainers. My last few review sites have been, at best, luke-warm although there have been some interesting features. It was therefore with trepidation that I turned this month to www.gowertraining.co.uk particularly – and I must declare an interest here – as I am one of Gower's authors (having written *Training Workshops for Listening Skills*).

I was fully prepared to find little of value or merit here; in fact, I was aiming to be hyper-critical. So it is with some pleasure that I am able to report that this is a nice, useful and interesting site, which deserves to be bookmarked.

This is, as you would expect, simply a site for Gower to market its training resources. Thankfully, though, Gower has paid attention to making a genuinely useful resource.

The homepage loads very quickly and is wonderfully unfussy. It uses the familiar device of a building – the Training Centre – with 'rooms' for navigation. However, familiar does not necessarily mean hackneyed or well-worn and this has always struck me as being a useful metaphor for a website to employ.

The colours are plain and clear, too – predominately blue and orange with black (hurrah) text on white. I sometimes wonder if web designers ever actually consider readability. Gower, as you would hope from a publishing house, has made this a key priority. Top marks.

The first room I visited was Reception. This is at the bottom left-hand corner of the building and would, in my view, be much better placed top right – which is where most people naturally look first. Since many of those who use the web tend to click first and think later, it makes sense to plan carefully the positioning of signs, otherwise they may be missed completely.

There's the usual visitors' book, which somehow seems very natural to complete since you are, after all, in Reception. Rather nicely – and quite unusually – there is a carrot in the form of four freebies to download to encourage you to sign. These, for some peculiar reason, are first loaded so that you can view them before downloading and are loaded singly – that is, four mouse clicks to access, then four separate saves. I'd guess that most trainers who register will want the freebies, so it would make sense to make these into one, auto-downloadable, file.

> The GAIA (Gower Activities Index and Abstract) project is really **the flagship of the site**

Of the downloads available when I visited, one was a rather good team game, another a fairly ordinary brainstorm of participant objectives. The latter referred to flipchart paper as 'newsprint'. Now, I know this is correct but I have my doubts about how many trainers understand and use this these days. (I used the term in a presentation only last week and was met with blank looks from about 70 people with a training background.)

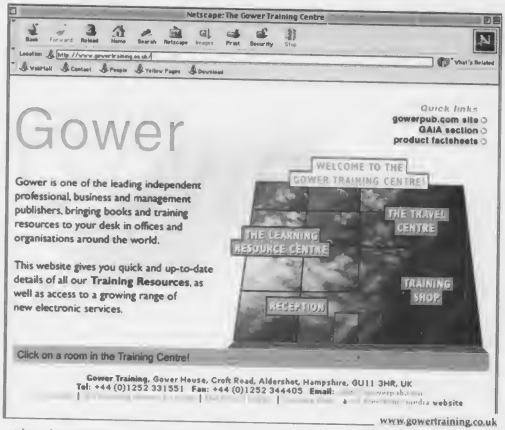
On from Reception and into the enticingly named Travel Centre. I guess I was hoping for travel links here (although I can't think why I should have done), so I was slightly disappointed to find that this is a clever phrase for the ubiquitous links page. The links themselves weren't up and running at the time of my visit but the intention, apparently, is to have a short review of each linked site, which is an excellent idea.

Journeying on I hit the button for the Learning Resource Centre, which is the largest part of the site and has a number of different sections:

- News headlines
- Events notice-board
- Product factsheets
- The GAIA project
- Team development games for trainers, electronic version.

The latter is an excellent piece of marketing and one that I suspect a lot of people will want to access. For a very reasonable £75 plus VAT you can download the complete version of this popular manual or you can order parts of it – for example, for £15 plus VAT you can have the activities that relate to 'Team surveys'. The electronic version means that you receive

Clare Forrest *would be pleased to know by snail-mail, email or carrier pigeon the URLs (web addresses) of any sites that you have enjoyed, loathed or just find plain indispensable so that she can bring them to everyone's attention. She can be contacted at (email) Cforrest@bigfoot.com*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Tel: +44 (0)1252 331551 Fax: +44 (0)1252 344405 Email:

www.gowertraining.co.uk

this as a computer file, which makes customising it for in-company use much, much simpler.

The GAIA (Gower Activities Index and Abstract) project is really the flagship of the site and there is a direct link from the homepage if you want to go straight there.

Gower has indexed and abstracted a collection of 2,760 training games, activities and resources, and made these available as 'the ultimate training resources pick and mix'. The brilliance of this is that you can just order one activity; you don't have to buy a complete manual. So, if all you want is a couple of new exercises for a well-loved programme, it's now very easy and cheap to get them. My only quibble is that you can't get these as downloads but have to wait for them to arrive in hard copy format by snail-mail – which seems a little strange.

To find what you need there is a complex search engine that allows you to search and refine your search in a number of different ways: keyword, timing, topics, participant numbers, participant levels and training method. It could hardly be more helpful, although I did find it a little complicated to use at first.

As you're refining your search the screen displays the number of results but this seemed to lag behind; when I checked one that said 'two results' there were, in fact, 67.

Results are displayed five at a time – ten would reduce clicking time substantially – with a short abstract. This was really the weakest part as the abstract was drawn straight from the main product description and often made little sense because it was out of context. Click on a description that interests you and you get a fuller description, a price and the option to order or to save the details until you visit again.

> This site **reflects the new ways** in which publishing and resource buying will take place in the future

This is a great site purely because it is simple, easy to use and provides a genuinely helpful service. In many ways it reflects the new ways in which publishing and resource buying will take place in the future. Gower has always been a standard setter in the field and it looks like its going to remain that way. ***CF***

Ratings	
Content	★★★★
Originality (for GAIA)	★★★★★
Navigability	★★★★★
Presentation and graphics	★★★★
Downloads and freebies	★★★
Links	★

Quick hits

www.freeskills.com
★★★
This site has a great concept – free, online training courses – but needs to pay attention to the quality of its central product, the training itself, which is flat and disappointing, and needs far more interactivity if a learner is to stick with it. I'll keep an eye on this site, which I think has great potential, and let you know if the product improves.

www.bizproweb.com
★★★★
A US-based but very comprehensive site aimed at small businesses. Worth bookmarking. Includes links to just about every management and business-related listservs and newsgroups.

www.askmegpie.com
★★★★★
Want to find journals that cater for your own professional interest? Thinking of writing an article, but not sure where to place it? Start here.

Training Resources

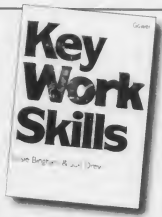
A round-up of **new and recently released** training resources.

• REVIEW

Key Work Skills

Rosie Bingham and Sue Drew

Gower, 1999.
Gower House, Croft Road,
Aldershot,
Hampshire GU11 3HR
Tel: 01235 331551
Website: www.gowerpub.com
ISBN 0 566 08183 0
Paperback £14.95
ISBN 0 566 08202 X
Ringbinder £150



This simple title hides what I see as one of the most important and valuable publications for some time for people who wish to develop themselves. It also doubles, in ringbinder form, as a resource package with a set of photocopyable masters for trainers to integrate into session or course training.

The book contains 20 sections that cover five of the six key skills developed by the QCA (formerly NCVQ). They are:

- communication
- application of number
- working with others
- problem solving, and
- improving own learning and performance.

Information technology is not covered.

The target audience is wide and includes: qualified professionals in their first year of employment or students gaining work experience; junior managers; middle managers who wish to refresh or add to their skills base; trainers for use in management skills training programmes; people seeking key sills qualifications; and people wishing to self-develop. Wow! And I can see it reaching all these and more!

The 20 sections have a standard format. Each starts with a page headed 'Why is this skill important?', then makes some comments on the skill, giving reasons why the reader should use the section and stating the objectives for the section.

These introductions are followed by a number of instruments, checklists, activities and further comments on the skill, ending with a reference list and bibliography – all aimed at achievement of the objectives.

One major advantage is that parts can be used, others omitted or the whole used as a composite approach to the skills. The sections include skills relating to: planning and managing your workload; report writing; using and presenting numerical data; ethics at work; meetings; dealing with pressure; mentoring, appraisal and interviews; professional development; and professional exams.

I give an unqualified recommendation of this book to anyone in employment. It's worth much more than the £14.95 for the self-help version, and for £150 gives trainers a library full of material to use in their training.

LR

***Leslie Rae** of Ellray Associates, can be contacted at (tel) 0114 248 3725.*

Ratings

Clearly defined learning objectives	★★★★★
Variety and approach	★★★★★
Support material	★★★★★
Trainer guidance	★★★★★
Universal practicability	★★★★★
Overall value	★★★★★

• REVIEW

Managing Career Development

Andrew Mayo, Geoff Atkinson and Karen Glasse

Fenman, 1999. Clive House, The Business Park,
Ely, Cambridgeshire CB7 4EH
Tel: 01353 665533
Website: www.fenman.co.uk
ISBN 1 872483 771
A4 ringbinder, £195 plus £4.90 carriage

Some of the 200 or so published UK collections of activities that come my way strike me instantly for their usefulness and immediate market. This collection of 16 activities did not give me an instant buzz and I was rather uncertain about its target audience – managers, other staff, the organisation. The publication seems to be a collection of activities (in the established Fenman format) that are stage-managed to help people assess where they are going at some stage in their careers. The point is effectively made that fewer and fewer people stay in the same organisation and, indeed, occupation for their whole career, and the activities aim to help them see these horizons more clearly.

The activities, in the main, are clear and well-laid out, but most are ones that I have encountered on a number of occasions in similar or different guises. It seems to me there are a number of other publications that are more concentrated on the subject and deal with helping the self-developer much more effectively than this collection.

LR

Ratings

Structure	★★
Innovation	★★
Content	★★★★
Usability	★★
Overall effectiveness	★★

• ONLINE LEARN

Innovative new computer-based training package by Audiosoft

TrainerPC is the first software package that enables instructors to develop their own interactive custom-designed learning resources in-house without the need for computer programming skills.

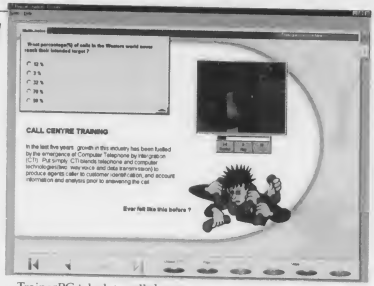
Featuring a 'wizard' system, instructors use a framework to rapidly create and modify lessons, from initial training through to advanced courses.

The flexible system enables the instructor to combine a host of multi-media features to stimulate the interest of students including graphics, video, text, animation and narration. All the lesson components are databased, allowing rapid location and incorporation into future lessons.

The system is particularly suitable for training where staff need to be re-assessed or tested on a regular basis and for organisations where there are a large number of personnel to train or a large turnover of staff.

The course programmes created by TrainerPC are sent direct to each student's computer via the corporate Intranet. Alternatively, for students further afield, the lessons can be sent via the Internet.

Students are able to navigate through lessons at their own speed while their progress is automatically assessed and evaluated using a variety of subject-related questions including multiple choice, true/false and multiple selection.



TrainerPC tabulates all the answers, completes an automatic marking schedule and stores the results on a database to allow analysis of classroom and student performance.

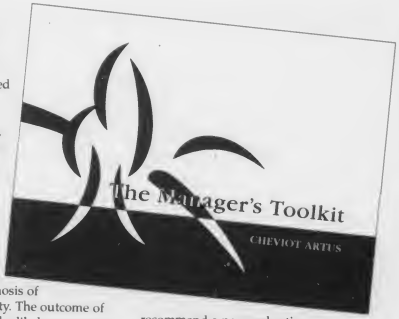
'We wanted to revolutionise the way that such courses could be created. TrainerPC was specifically designed so that instructors who are not PC or software literate can produce competent and well-developed training courses and briefings as well as electronic publications,' says Audiosoft's sales and marketing manager Nick Bentley.

For further information contact Nick Bentley at (tel) 01285 883800 or (fax) 01285 883801.

• REVIEW

The Manager's Toolkit

Cheviot Artus Occupational Health plc,
50 Regent Street, London W1R 6LP
Tel: 0171 287 8191
ISBN 0 953542 0 5
Pack £145 (plus VAT)



This is a well written and well presented pack produced by stress management consultants, with a core content influenced by the International Stress Management Association. It is aimed at managers, trainers and personnel staff.

The toolkit offers a step-by-step approach through an introduction which, quickly but painlessly, engages readers by asking questions about their own stress levels – taking them through diagnostic exercises, a personal action map and flowcharts that lead to what tools might work for them.

The pack pulls together 25 different but stress-related tools ranging from outlawing negative thinking to time management, delegation and assertiveness, plus relaxation and exercise techniques.

Reproduction of certain sections is permitted. The recommended application is for individual work, as well as one-to-one coaching and team working. A small criticism is that, although one tool is a diagnostic questionnaire to establish A and B personality, the associated action points recommended appear a bit simplistic. For example being told, 'Don't put it off; do it now!' might fall on the deaf ears of a B type.

In my view the pack would be further enhanced if it deployed, or was linked to, a more detailed diagnosis of aspects of personality. The outcome of this might suggest the likely success or otherwise of some of the tools offered and thus switch the user on, not off, when having a go.

This is also, perhaps, particularly relevant if managers, as suggested, are to help in one-to-one coaching of colleagues so that before they start they have a better understanding of themselves and thus what works for them.

There is a good reference section to draw on including definitions, a book list and useful contacts. The authors recommend a personal action plan, which is valuable to measure individual progress and encourage feedback to them to further improve the toolkit. ***SF***

Stuart Farrer *is a personal and organisational development consultant. He can be contacted at (tel) 01225 482785 or (email) 114407.1475@compuserve.com*

Ratings	
Structure	★★
Innovation	★★★★
Content	★★★★
Usability	★★★
Overall effectiveness	★★★

Schools for **thought?**

Andrew Mayo is a consultant, speaker, writer and facilitator in international HR management, with specialisms in people and organisation development. He can be contacted at (tel) 01727 843424 or (email) andrew@mlltd.com

If somebody has been to a business school for a course lasting anything more than a week it is quite likely to feature on their cv as something in which they have some pride. **Andrew Mayo** examines why, then offers a spin on 'tradition'…

Those who have attended, say, a two or three month course are likely to derive a great feeling of having survived. There may have been late nights studying complex cases and reading famous (and not so famous) articles, energy-consuming and competitive business games, filling out questionnaires, fierce debates and convivial dinners.

At the end of it all, it feels great to have been there; reunions have been pledged, and email addresses logged. But in the grey dawn of the first Tuesday back, when the reality of the workplace has regained its grip, what then?

The school itself will have worked hard to provide good teaching and a variety of learning methods. It believes it is at the core of management development, for which it charges significantly in a vibrant and growing market that seems to justify fully its contribution.

Critics, such as the authors of *Gravy Training* (Crainer and Dearlove), can find many faults with the process itself – such as the constant re-run of old cases, the regurgitation of complex models, the panoramic overview of a subject that leaves delegates dazed after two hours, the inability of many professors to engage in debate or acknowledge the experience in the room.

Students of the learning process and devotees of the learning cycle will demonstrate the incompleteness of learning, the assumptions about common learning styles, and the fact that research has consistently shown that most management learning/development is derived from experience and practice and very little from off-the-job programmes.

What can we conclude about the added value derived from the not inconsiderable investment that is made? Does it exist beyond the pride and enjoyment of the attendee? Is there any way a 'return' on that investment could be evaluated?

Like all such decisions it depends on the objective in the first place – often surprisingly ill defined. This may be purely personal – to provide a reward or to meet an ambition in an individual's own development. One South African I spoke to recently at a large business school had chosen a four-week programme as an alternative to outplacement. It may be personal *and* business related – gaps to be filled in business knowledge and understanding, or just the need to broaden beyond a straight functional career.

> **It is not enough to be an imitator** of others who use business schools

Some of the most common and valuable outcomes are unstated as objectives – the varied network of friends that results, and the opportunity to reflect on work and life away from the turmoil of the office. The ones most likely to have an effect in the workplace are those programmes designed to be more than one module as people undertake projects or complete assignments based on inputs from the school.

So far, all this is about individuals attending programmes. However, a fast-growing area for all schools is the custom-designed programme for one company. It seems to me that the role of the school is *potentially* different here. (I say potentially, because it could be no more than bulk attendance at a programme little different in design from its 'open' equivalent).

The difference can be between being a mere purveyor of education and a partnership for change in the organisation *plus* providing a rather special environment, rich in resources and designed for thinking, debate and reflection.

So much change is dependent on reformulating our view of the world – what academics call our paradigm – and it is little benefit for individuals here and there to 'see the light'. I remember in the 1980s the transformation of the company in which I worked, which was strongly aided by the mandatory participation in a business school event that the CEO had helped to design himself. The whole language of the executives, the bases of decision making, the ability to focus and awareness of the external world changed throughout the company.

Schools can provide a platform for dialogue with top management, and for the exchange of knowledge and experience between delegates. Debate on live issues for the company can be placed in context with good practice from other organisations. The trend to make academic content available on the web is growing – but a climate and environment for meeting and discussion cannot be replaced electronically.

Potential investments will become mere costs if there is no clear purpose. It is not enough to be an imitator of others who use business schools. Top management should own the initiative and be following its effectiveness, seeing their programme as facilitating their objectives. Never work with a school that re-labels a standard programme with your company name. But if you find one that is willing and able to be a real partner in *your* programme, then value can be added in a significant way.

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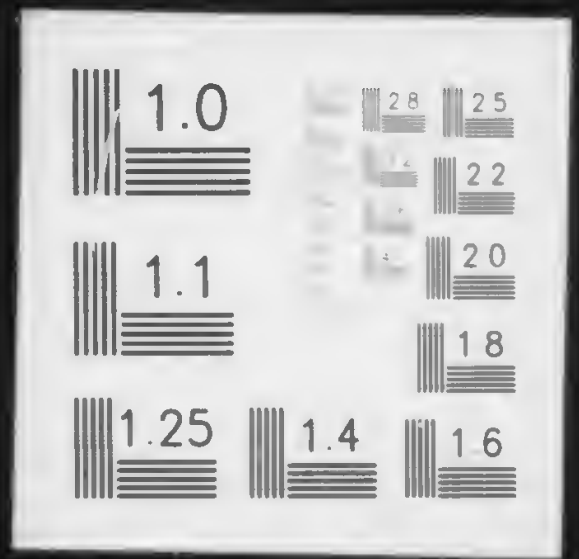
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